# VOCALCOM Hermès .NET V.4

## Administration .NET V.4 - User Manual

| VERSION | DATE | AUTHOR |
|---|---|---|
| HERMÈS .NET V.4 | 01/01/2009 | VOCALCOM |
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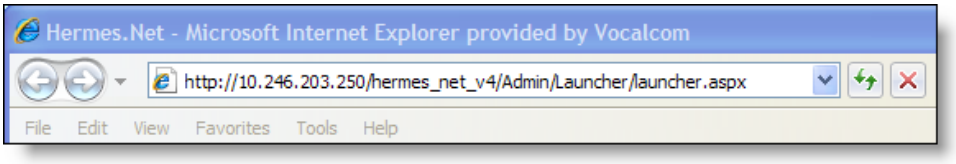
# INTRODUCTION

Hermès V.4 Edition and its applications provide a Call Center administration tool called « Administration ». This document explains in detail all available functionalities of the administration tool. The application enables administrators to manage campaigns, queues and agent configuration.

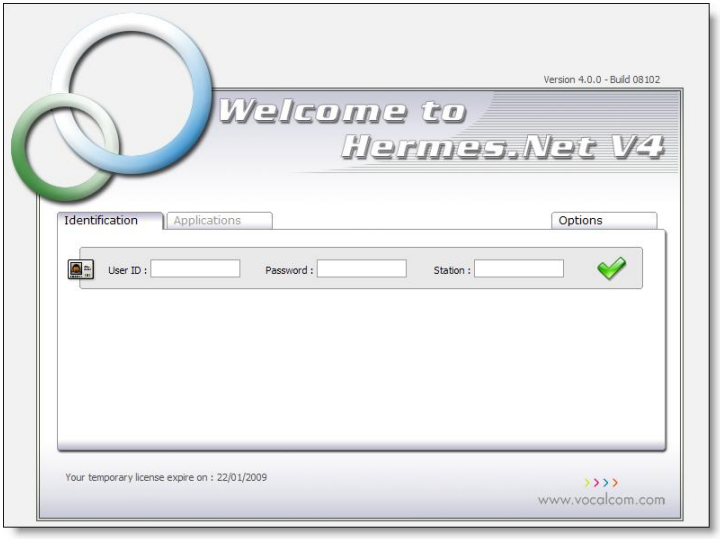
## Get Started

Once the application is installed properly, it can be accessed through the following URL:

http://localhost/hermes_net_v4/Admin/Launcher/launcher.aspx

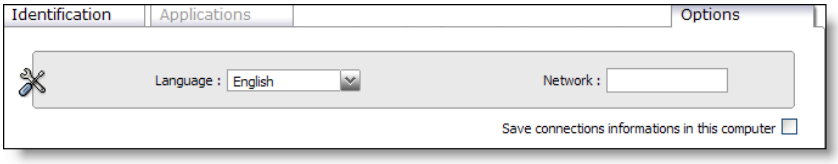

Hermes.Net - Microsoft Internet Explorer provided by Vocalcom
http://10.246.203.250/hermes_net_v4/Admin/Launcher/launcher.aspx
File Edit View Favorites Tools Help

The first start-up after installation typically requires a bit more time before popping up the ID screen. (All future launches will be significantly faster)




The administrator has to enter his identification information before he can start using the application.

The **Options** tab allows the user to select the **Language** in which the application should be launched.



After entering the necessary information, the user presses the **Enter** key of the keyboard or clicks on the **Login** button, upon which the system verifies the data. If the information and password are correct, the application selection window appears.

Note: if you add the URL listed in the trusted sites of Internet Explorer of the workstation on which the application is running, the status bar at the bottom of the screen will not appear.

To **close** the application, simply close your internet explorer browser.

## Administrator profiles

Installing the application requires intervention from an administrator with a « Master » profile. He must first initialize the system's main resources before other users can connect and use the application. This intervention is the latest phase of the installation procedure. It includes the creation of:

- One or more company or site administrators
- One or more administrators with a « Master » profile
- One or more entities called « Company » or « Site »

Whereas the first step is optional, the other two are mandatory to allow other users to be defined in the system for future use of the application.

Basically, a “master administrator” **administrates all companies**, whereas a “site administrator” only **belongs to a single company or site.**

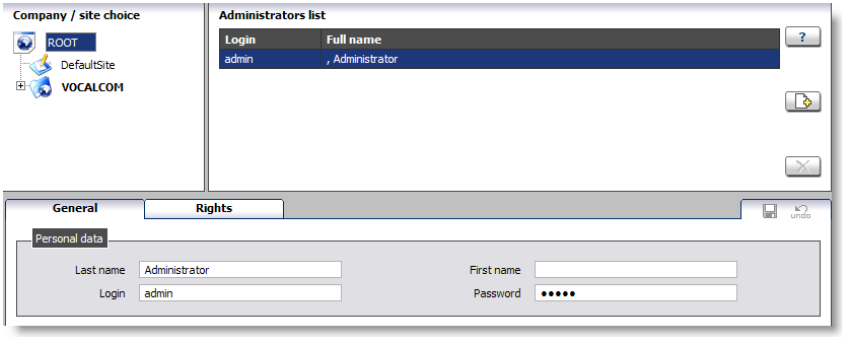
Once the master administrator has created the different entities (Companies or sites) he can create administrators and agents. Those are then assigned to particular company or site.

However, these 2 administrators do not see the same menu because they have not been attributed the same rights:

- **Master Administrators** can create companies and administrators (master or site admin).
- **Site Administrators** can only create agents for sites to which they have access. The other functions of the menu are identical.

## Create Administrators

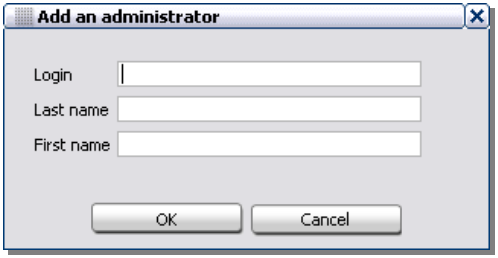
You get access in this menu to the management window of master administrators defined in the system. Only a master administrator has access to the ROOT ( see print screen, top left of the window) level of the application, and only a master can create other masters.

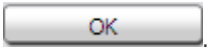



With the and buttons administrators can be added or deleted.

### 1.3.1 Adding an administrator

If you click on the button, the following dialog box appears.

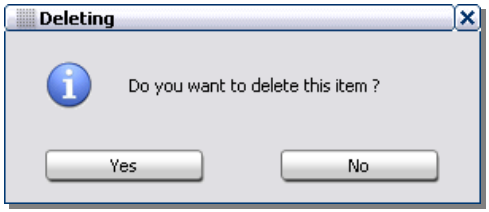


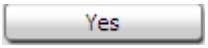

Enter a unique Login and a name and first name to identify the administrator and click on 

. The **General** tab allows you to continue customizing the element created. (See section « General tab » on page 15)

### 1.3.2 Deleting an administrator

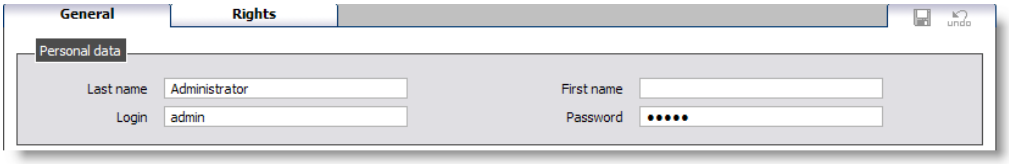
Select the element to be deleted from the list on the right side and click on the button.
The following confirmation message appears:




Click on the  button to confirm deleting an administrator.

#### General tab

With the **General** tab you can define the administrator's personal information.



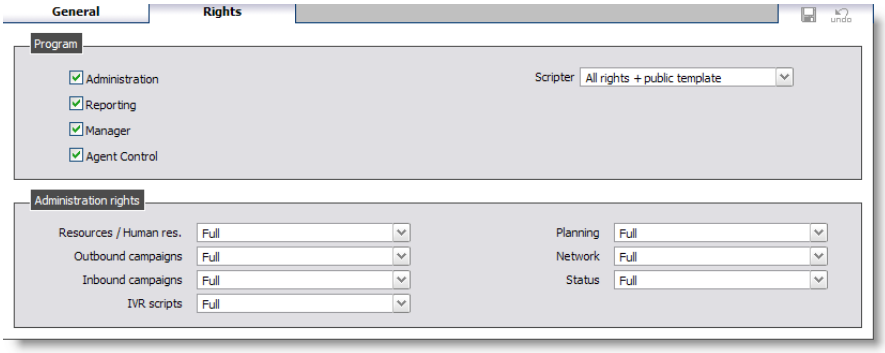

You can change **name**, **first name**, and identifier (**login**), and choose a **Password**. If you don't want to manually choose a password, click on the button and the application automatically produces a random password.

With the and buttons in the upper right corner of the screen you can save or undo latest modifications. The latest unsaved changes are marked in red and an asterisk appears next to the name of the tab as long as the modifications are not registered.

At that moment you can still restore the previously saved status with the button.

## Rights tab

The **Rights** tab is used to define the administrator's access rights.




In the **Program** area (top), you can select the applications at the disposal of the administrator on the application selection window (Interface designer, Supervision, Reporting, Agent).
In the **Rights** area (bottom), you can define the administrator's access rights with regard to the following menus of the administration module: Resources, Inbound and Outbound campaigns, IVR scripts, planning, network, call status. For each of the elements, you can specify:

- **None**: the administrator has no access to the menu at all
- **Read**: the administrator can only read information
- **Modify**: the administrator can make changes to the parameters
- **Full rights**: the administrator can add and delete elements of that type

## 1.4 The Applications Selection Screen

In this window the administrator can launch one of the following applications:

- Administration
- Interface Designer
- Reporting
- Supervision
- Agent

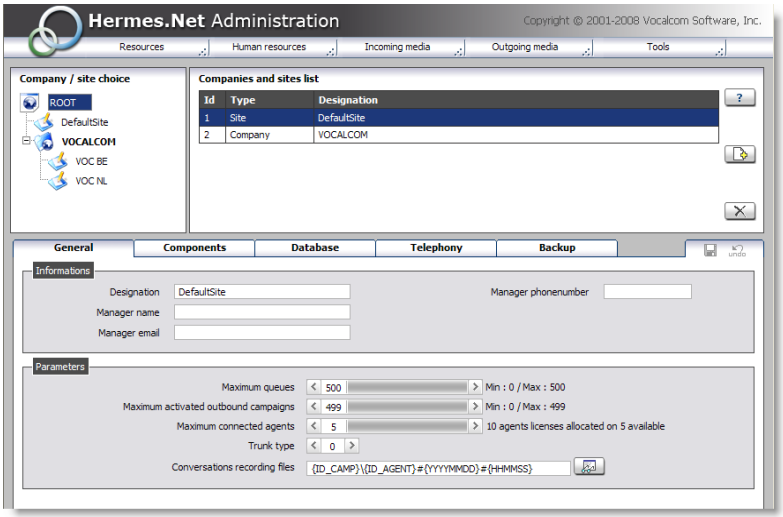
These applications are available depending on the rights given to that particular administrator. If only one application was made available to him, the system will automatically launch it. If not, the user must press the button next to the application he wants to start.

This document explains the Administration application; the other Hermès V.4 applications are discussed in separate documents.

Depending on the type of administrator identified (Master or Normal), the main Administration window displays different elements, and all of them will be explained in detail further in this document.

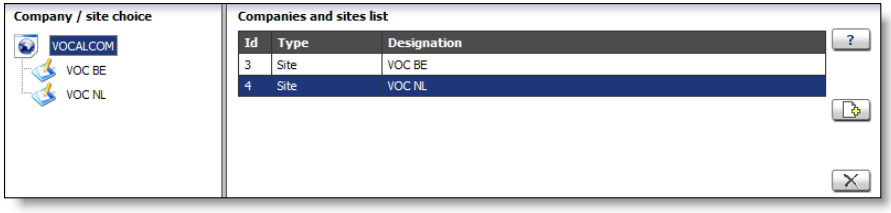
## 1.5 Master & Company Administrator

When a Master or Company administrator logs in to the **Administration** application, the following window is displayed.

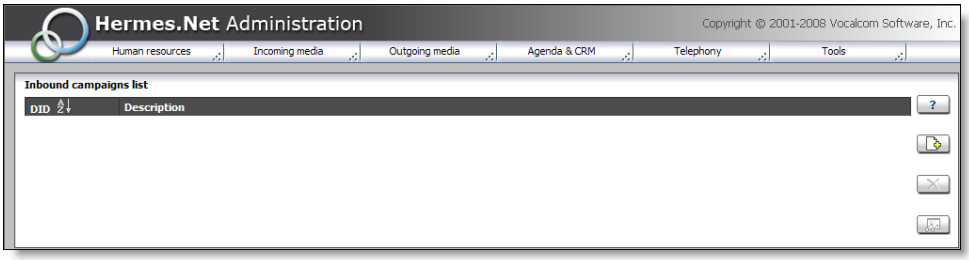


Because the administrator belongs to a specific company, he can only manage resources belonging to the company displayed in the selection screen on the right side of the screen.

Furthermore, he also has access to branches or sites that are part of his company. The explorer shows him the elements to which he has access. As you can see in the print screen below, the **root** isn't accessible anymore in the explorer menu (top left).

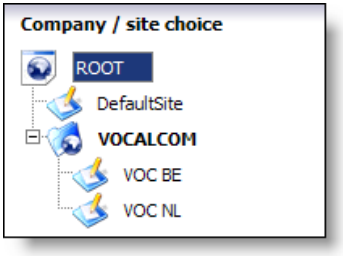



If the administrator only has access to a single site, the arborescence is not even displayed. He is merely a **site administrator** with no rights to create other administrators. He may not even know that other companies or sites exist (see print screen below). You'll notice that the access is limited to the operational menus explained later in this document.



## Companies and Sites architecture

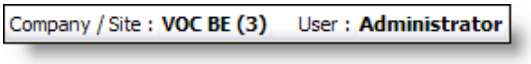
These entities allow you to create and manage agents, campaigns, queues, administrators, etc... which will be restricted to their own entity. This restriction allows keeping the data (reporting, supervision, scripter editor) of every site independent from each other.
They are presented in a tree diagram in the upper right side of the screen. This view allows easy visualization of companies and sites to which access is granted, as well as their organization and structure. Remember that only a Master admin has access to the root.



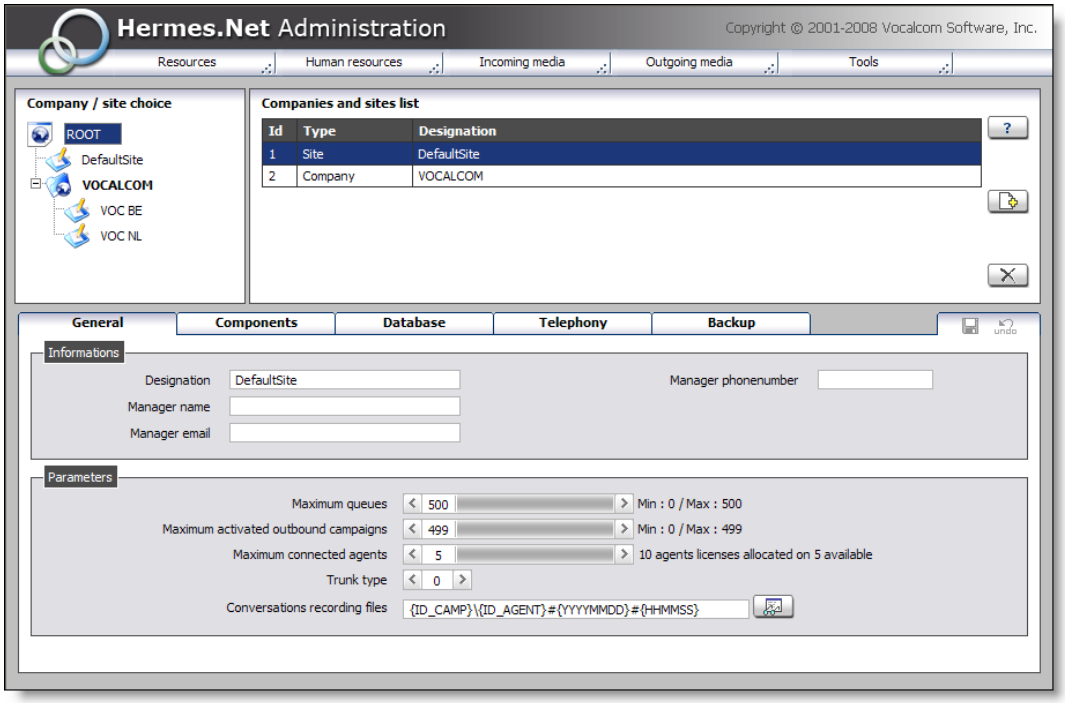

A company can be composed of several sites or branches (sub-companies). Administrators defined at company level only have access to the entities that are part of it.

A site is the smallest unit and cannot contain other entities such as sub-sites or sub-companies.

The name of the company or site is displayed in the status bar on the lower right side of the screen.



# Master Administrator Screen



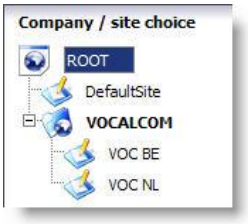

The main screen is divided in 4 different elements:

## 1.7.1 The Main Menus (top of screen)

At the top of the screen, this area consists of buttons representing the major site elements and listing all sub-functionalities

### 1.7.2 Explorer Window (top left)

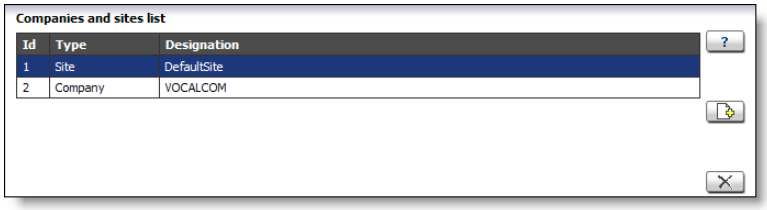
It allows access with a single click to all the entities which one has access to.




This window only appears on the screen of a master or company administrator, not a site administrator.

### 1.7.3 The Main Selection List (top middle)

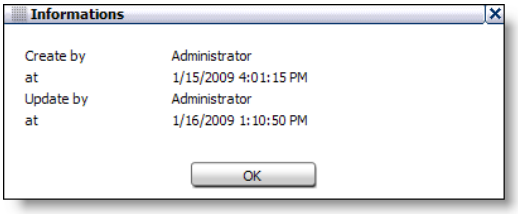
After the launch of the application, this list shows either the list of selected sites and companies, or the campaign list of a selected site. Afterwards, its content depends upon the choice made in the Resources menu.




Selecting an element from this list displays its respective information in the lower area.

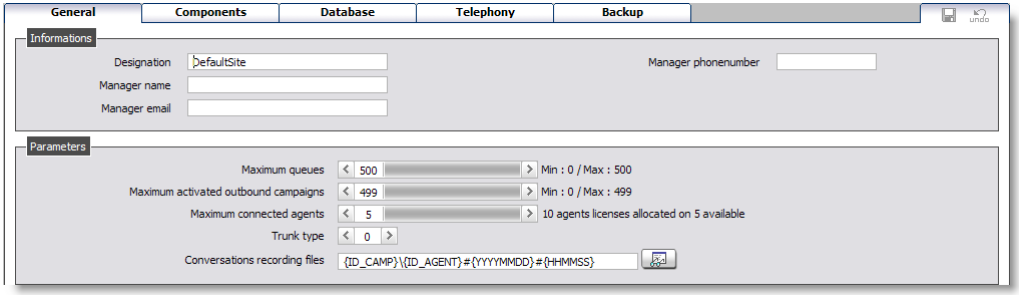
On the right side of this list, the and buttons allows you adding or deleting elements. To add a new item, a window is displayed to enter the identifier of the new element, along with detailed parameters that can be adapted in the lower area of the screen.

Upon clicking the button you get information about the creation and latest modification of the selected element from the list.

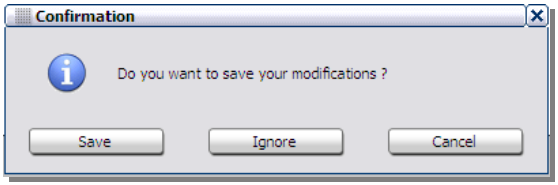


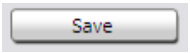

### 1.7.4 Options of Selected item (middle bottom)

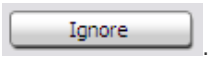
The options displayed depend on the selected element and its type. On the top right side of this area are 2 buttons: and to save or undo changes executed on the element. The latest unsaved modifications are marked in red; the tab on which they are displayed is marked with an asterisk.



If you try to leave a window in which modifications were made but not yet saved, the following message will appear:



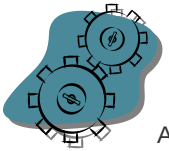

This allows you saving the modifications by clicking on 

or to restore the situation last saved by clicking on 

.

The application window can be resized and the elements displayed in it are automatically rearranged upon changing the window size.

## ROOT RESOURCES

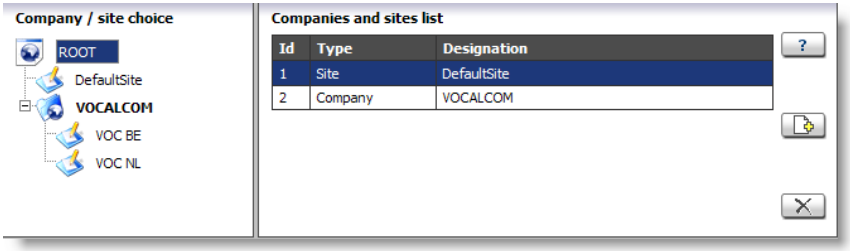


At ROOT level, the **Resources** menu gives access to defining the following common parameters:

- Companies / Sites
- Components
- Proxy CTI
- Database Connections

## Companies and Sites

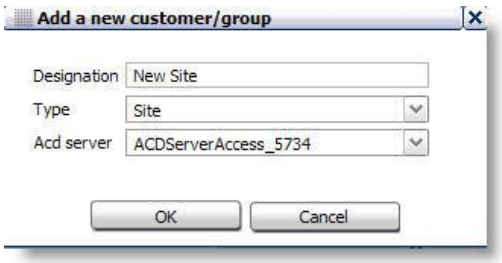
The **Company/sites** option gives access to managing companies and sites defined in the system (ROOT level).




With the and buttons you can add or delete one of the elements that belong to the active company.

### 2.1.1 Add a site or company

By clicking on the button, the following dialog box is displayed:

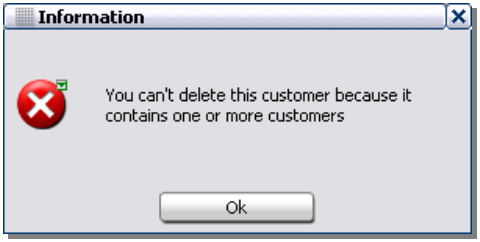


Enter a name and select a « Site » or « Company » from the **Type** list.

Click on OK to create the element or Cancel to close the window and undo the creation.

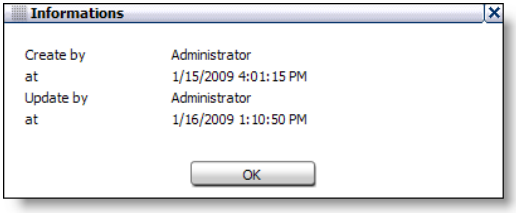
### 2.1.2 Delete a site or company

Select the element to be deleted from the list and then click on the button. If the company contains at least one site or sub-company, the following message is displayed:




This warning stops you from deleting elements you may have forgotten about within the selected company. It is thus necessary to go to company level (in the navigation arborescence) and delete all sub-elements before being able to delete the company itself.

With the ? button you can get more information on the creation and latest modifications of the element selected from the list.



### 2.1.3 SITE OPTIONS - GENERAL tab

This window contains general information about the company or site selected from the upper right list.

The **name** of the company or site selected can be found in the **Information** field.
The **Parameters** field contains the following items:

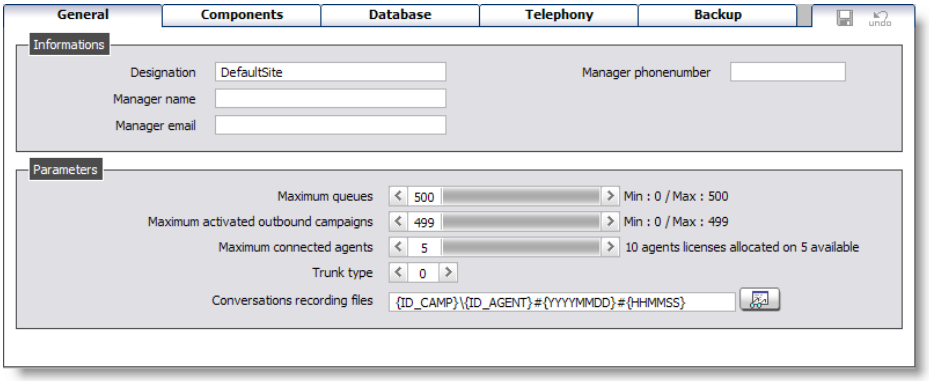
**Maximum queues allowed on this site**
**Maximum activated outbound campaigns allowed on this site**
**Maximum connected agents allowed on this site**
**Trunk type**
**Maximum created mail campaigns allowed on this site**
**Conversations recording files**

These values are then used as maximum in the branches and sites within the selected company.

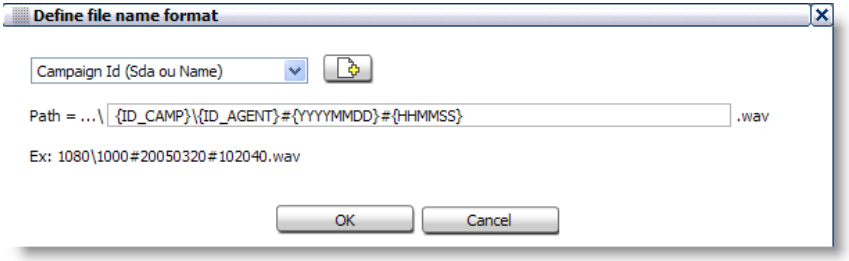
At ROOT level these limitations depend on the maximum values defined in the system. The values defined at ROOT level are cascaded between sites and companies. (Ex: on system level, 500 queues are defined. If you assign 50 queues to a first company, the limitation for the second company will be between 0 and 450. For 3 sites created within the first company, the first limitation will be between 0 and 50, and if you assign 10 queues to that first site, the second one will have limitations between 0 and 40, etc…)

In the **Site parameters** field, you can indicate the **trunk type** to be used by all lines deployed in the selected site.

A field named **Conversations recording files** allows you to customize the name of all recorded audio files.



The button can be used to show a dialog box helping in the formula construction:



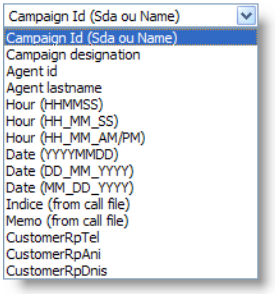

By default, the system proposed a name composed of the agent ID, the date and the time of the call, in a directory corresponding to the campaign ID:

{ID_CAMP}\{ID_AGENT}-{YYYYMMDD}-{HHMMSS}.wav

This window is also accessible via the **Option** menu with the item **Path & Name of recorded conversations** as well.

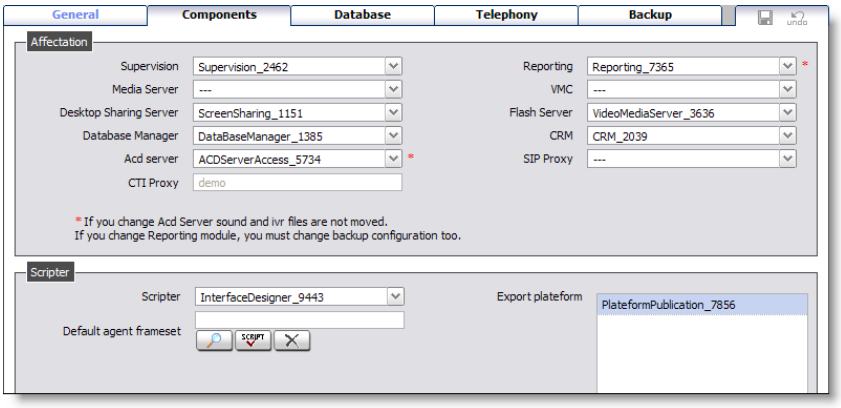
Use the list at the top of this pop-up to select any item and add it into the formula using the button .

**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici. - Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**




### 2.1.4 SITE OPTIONS - COMPONENTS tab

Here you can assign an instance of each component defined on the system to the site or the company selected. These components are installed by Vocalcom in the menu Resources\Components. After installation, the administrator only assigns them to a site or company.




The modules listed in the affectation list are:

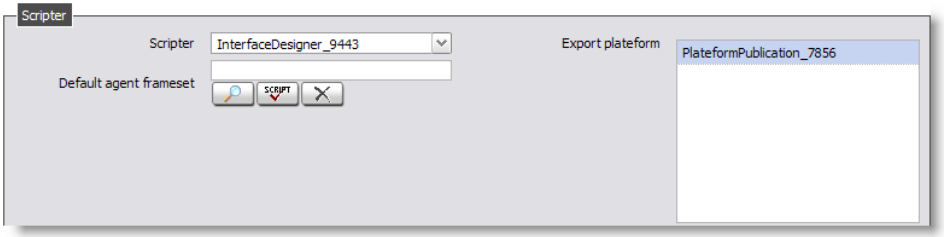
**Supervision**

**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici. - Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**

**Reporting**
**VMC**
**Database manager**
**ACD server**
**Flash Server**
**Desktop Sharing Server**
**Media Server**
**CRM**
**CTI Proxy**
**SIP Proxy**

Proxy indicated here is disabled and cannot be changed. The proxy affectation is done via the Resource menu “Proxy CTI”.

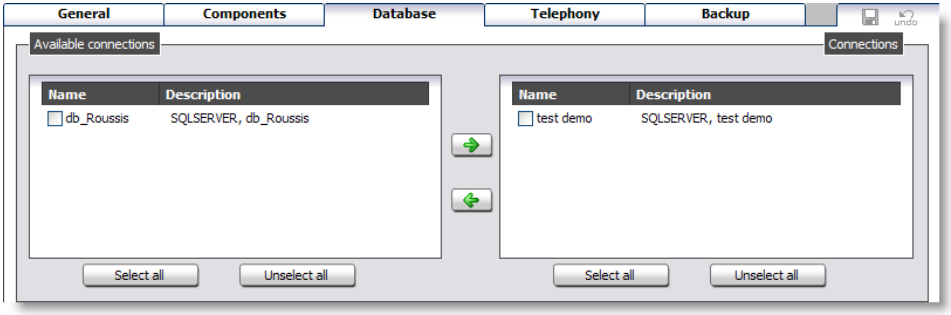
The **scripter window** at the bottom, allows enabling or disabling the access to scripter module. A Frameset can be also be assigned to a particular site. Once a Frameset is assigned to a site, it becomes the standard frameset for all users of this site.



**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici. - Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**

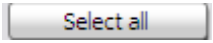
### 2.1.5 SITE OPTIONS - DATABASE tab

This tab is used to assign database connections to the site or company. Connections are first created in the "Resources/Connections" menu.




The available connections defined on the system are shown in the list on the left side of the screen. To assign one or more connections to the selected company or site, you simply check the box in front of the connection and click on the button to move it to the list on the right side.

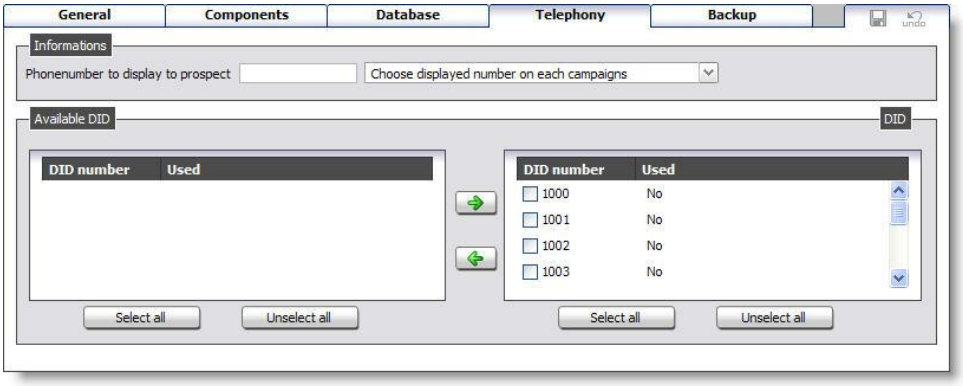
To remove a connection from a company or site, you simply check the box in front of the connection on the right side and click on the button.

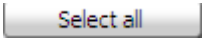
By holding the  button at the bottom of the list you can assign or remove all connections at once. With the button you can deselect all connections in one click.

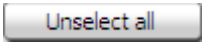
**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici.** - **Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**

### 2.1.6 SITE OPTIONS - TELEPHONY tab

This tab is used to assign DID's (Direct Inward dialing) to the selected site. A DID is the definition ID of an inbound campaign. Usually the DID corresponds to the 4 last digits of the real phone number used for directing the calls to the "Inbound campaign". The DID's are first created in the menu "**Incoming Media/DID**". The available DID's defined on the system are shown in the list on the left. Only the DID's which are not assigned to a site appear in the available list. To assign one or more DID to the selected site, simply check the boxes next to the DID and click on the button to move them to the list on the right side. To remove a DID from the site, check the box next of the DID in the list on the right side and click on the button.



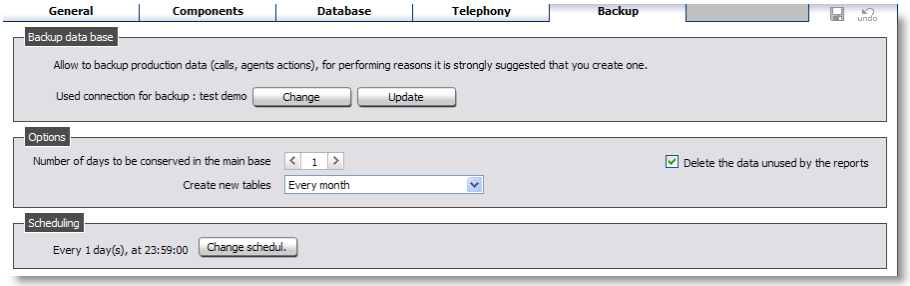

You can assign or remove all DID's in one action by using the 

button at the bottom of the list in question. Clicking the 

button will unselect all DID's in one single action.

### 2.1.7 SITE OPTIONS – BACKUP tab

This window allows saving critical production data, (calls, agents actions). For performing reasons it is strongly recommended to create one.




The backup tab is divided in 3 area's:

- **Backup database**: used to choose the database used for the backup
- **Options**: set how many days of data should be kept in the main base
- **Scheduling**: allows choosing the time for the beginning of the archive process

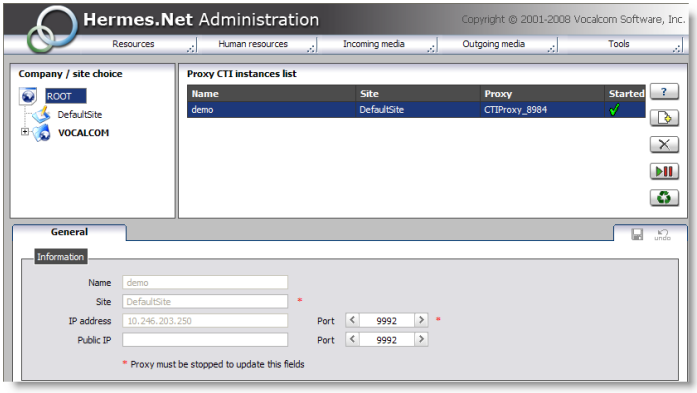
## Components

This menu is used to define the application components that can be assigned later by the administrators to companies and sites. The parameters defined here allow the Hermès V.4

system to localize and connect each module needed by the whole application: Web Scripter platforms, AgentProxy, AgentLink, services used for various media like emails.

The components are installed by Vocalcom and should never be deleted or updated by the user unless Vocalcom is aware of it. A technical note is available with more details about the different modules and their installation procedure.

## Proxy CTI




This menu is used to define proxies running on the current server.

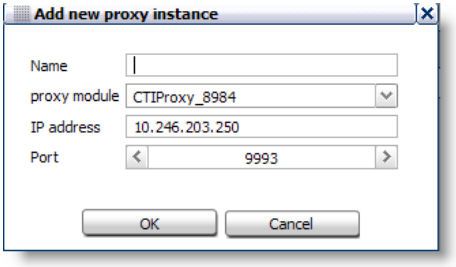
A proxy is the middleware part of the system between the telephony server and the clients (agents, supervisors). It's used to isolate each client data communication on a common ACD machine.

The proxies are afterwards assigned to sites. In the proxies list, the **Started** column indicates if the proxy is running or not. Use the and buttons to add or delete a proxy: this operation creates or removes a "service" using the executable AgentProxy.exe from the ACD server services list. The button is used to launch or stop it: it starts or stops the created

service. The button can be used to refresh the Proxy cache. It can be used if you see that your last changes were obviously not taken into account by the system.
Creating a proxy requires to unallocated one “Agent licence” which will be automatically used when activated. This decreases of course the maximum amount of possible logged agents (-1 agent).

### 2.3.1 Adding a proxy

If you click on the button the following dialog window appears.



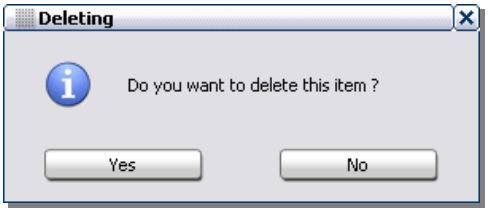

Enter a name and select from the **proxy module** list the location of the new proxy. These items have been defined using the **Components** menu. Enter the proxy IP address and port.

Click on to create the element or on to close the window and undo the creation. In the lower part of the screen you can continue customizing the element thus created.

### 2.3.2 Deleting a Proxy

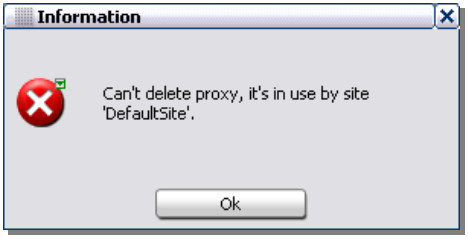
**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici. - Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**

Select the element to be deleted from the list on the right and click on the button.
The following confirmation message appears:



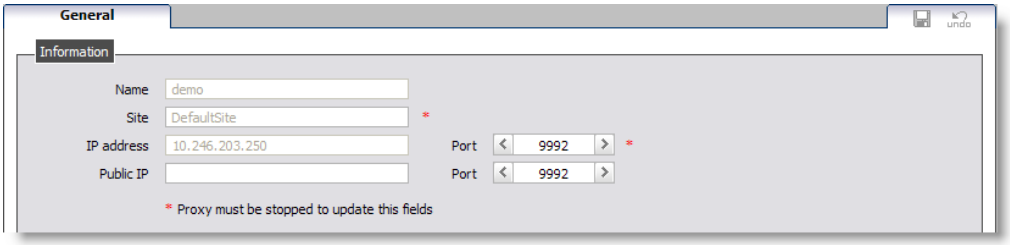

Click on the button to confirm removal.

It's impossible to remove a used proxy. The next message appears:




In this case, you have first to stop the proxy and delete the site name indicated on the General tab.

Once added, the proxy can be assigned to a site and its parameters can be adapted via the General tab:



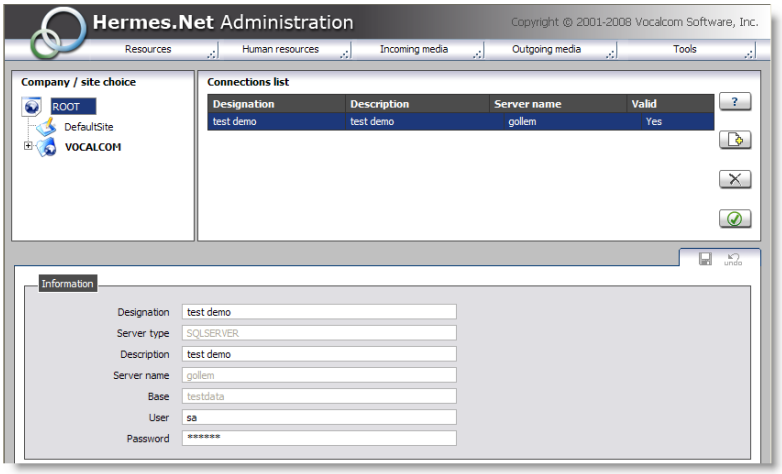

**Site** : this field proposes the list of existing sites defined on the server.

Once created, use the button next to the proxy in question to start it. If startup is successful, the column displays under the header **Started** next to the proxy name.

## Connections

In this window you can define connections to the databases that will be used by the sites for the creation of call files, and also for the creation of client files in the Web Scripter application.

**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici. - Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**

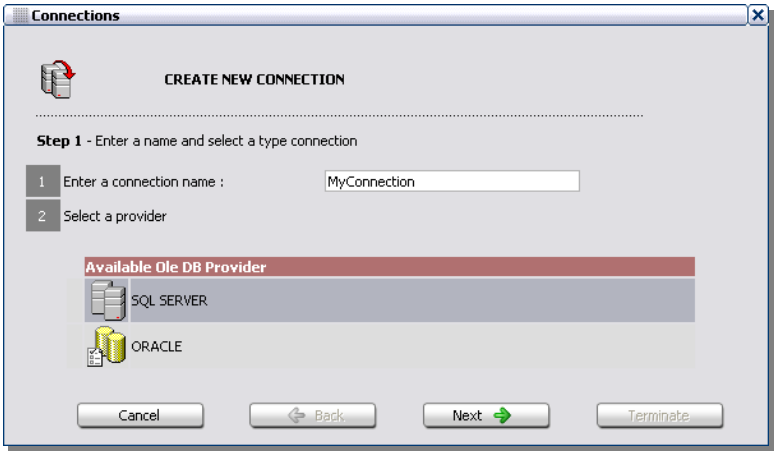



With the and buttons you can add or delete connections, while the button is used to test parameters entered for the selected connection and to indicate if they are valid or not.

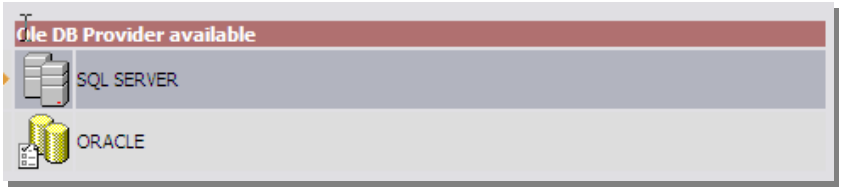
### 1.1.1 Adding a connection

Press the button to create a new connection to the database server (SQL, Oracle).

**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici. - Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**



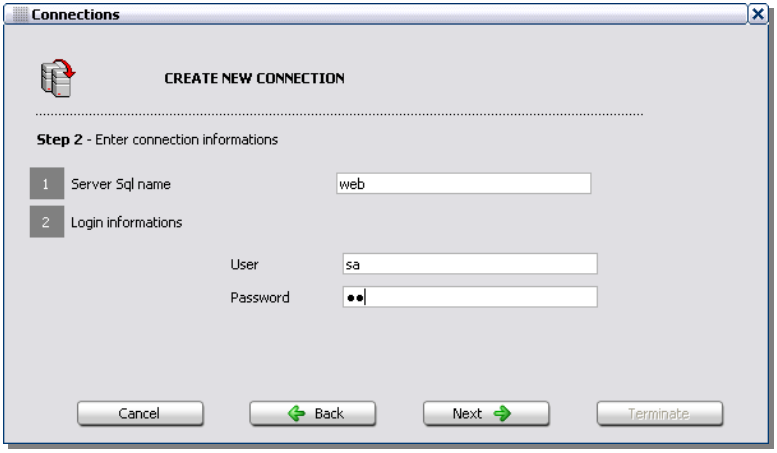

Enter a **connection name** and select a **provider** from the list with the following options:




Click on to go to the next screen.

**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici. - Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**

### 2.4.2 Creating a SQL connection




Enter the **SQL server name,** l**og-in information** and **password** to connect to the server in question.

Click on

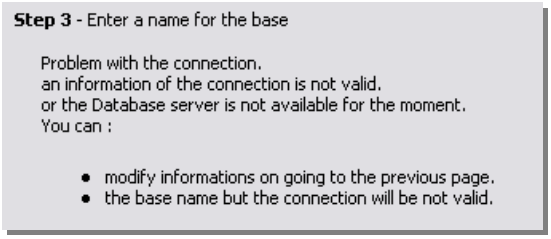
to go to the following screen.

The application attempts to connect by using the indicated parameters.

If the application fails to connect, the wizard recommends going to the previous step with the

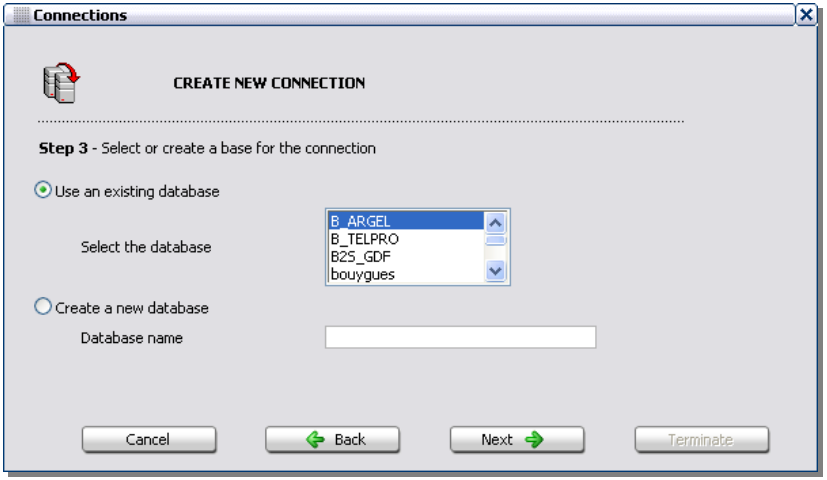
button and correct the parameters you entered.

**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici.** - **Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**


Step 3 - Enter a name for the base
Problem with the connection.
an information of the connection is not valid.
or the Database server is not available for the moment.
You can :
modify informations on going to the previous page.
the base name but the connection will be not valid.

Nevertheless you can continue regardless of the error message. The wizard will ask you to enter the **database name**.

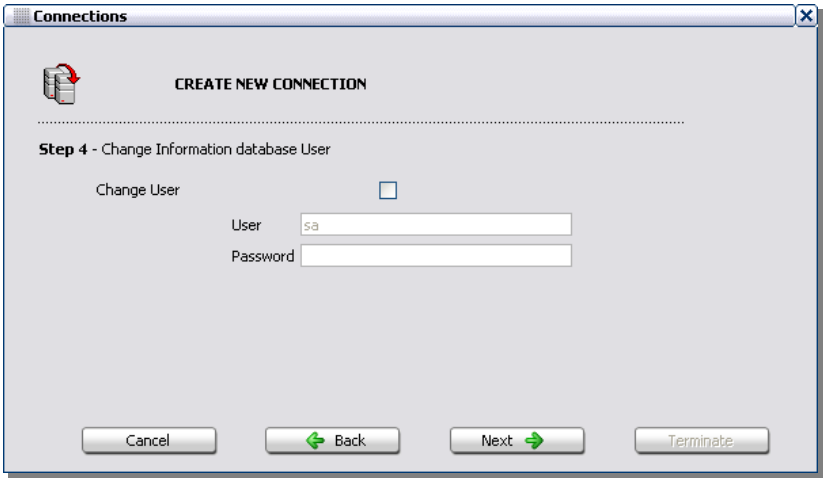
Once the connection is established, the list of existing databases on the server is displayed and the wizard asks you to select one or to create a new one by entering its name.




Click on

to go to the next screen.

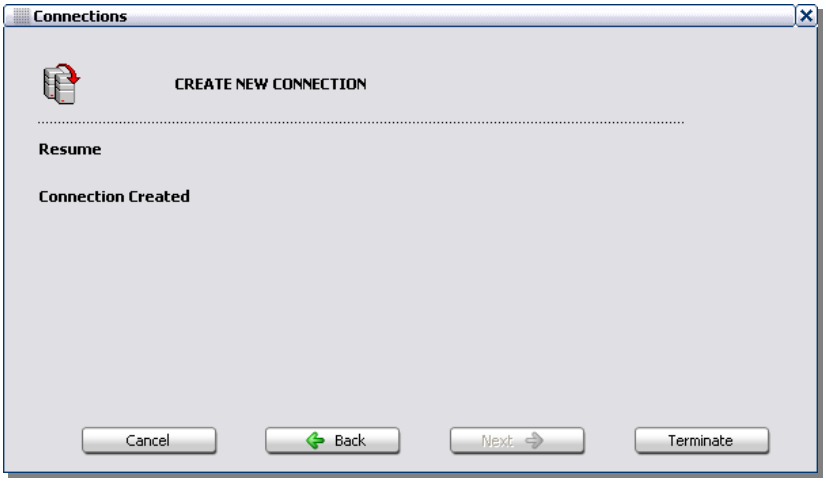
**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici.** - **Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**




The final screen asks you if you want to change the identifier or to use the default one to connect to the database. Check the box **Change User** if you want to specify an other identifier in the field **User**.

Click on to go to the following screen.

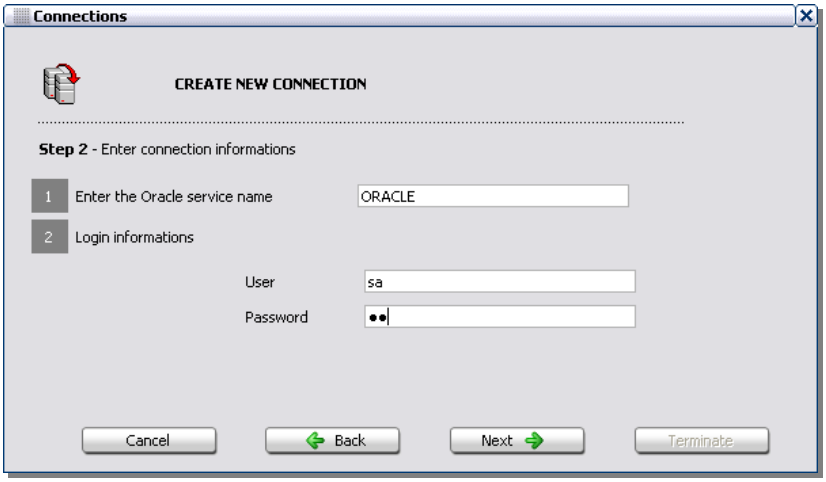
**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici. - Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**




The last screen displays an overview of the previous steps and allows you to undo the creation by clicking on the button.

**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici. - Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**

### 2.4.3 Creating an Oracle connection




Enter the **Oracle database name** and **log-in information** such as **user** and **password** to connect to the server indicated. Note that this information is case-sensitive!

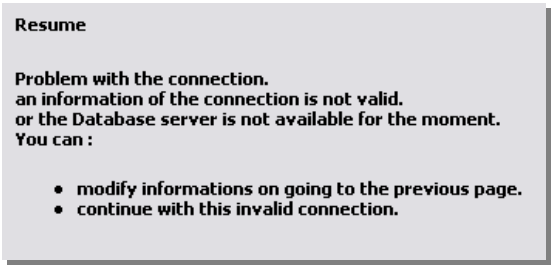
Click on

to go to the next screen. The application attempts to connect using the indicated parameters.

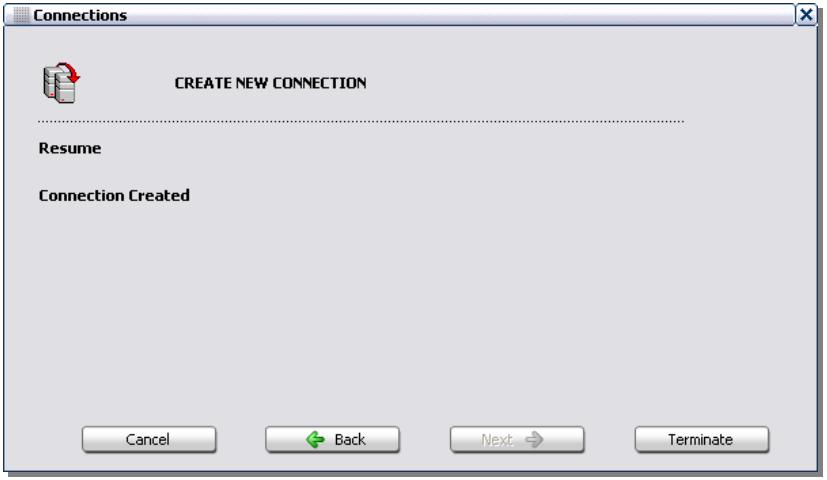
If the application fails to connect, you will be asked to go to the previous step using the

button to correct the parameters you entered.

Nevertheless you can terminate regardless of the error message. The wizard shows you the summary window.


Resume
Problem with the connection.
an information of the connection is not valid.
or the Database server is not available for the moment.
You can :
modify informations on going to the previous page.
continue with this invalid connection.

If the application successfully connected, the following window appears:

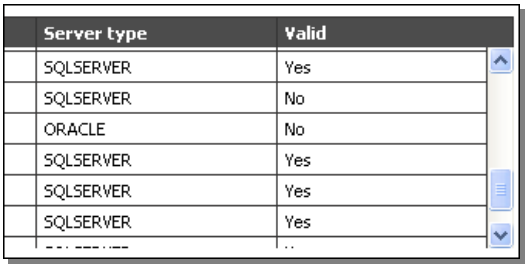


With the

button you can confirm the creation and go back to the main window.

### 2.4.4 Testing a connection

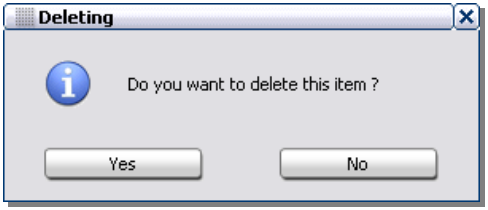
Once the connection is established, use the button next to the connection to test the validity of the parameters. If the application succeeded validation, the **Valid** column displays **Yes**; if not, the parameters have to be modified in order to be used later on.



| Server type | Valid |
|---|---|
| SQLSERVER | Yes |
| SQLSERVER | No |
| ORACLE | No |
| SQLSERVER | Yes |
| SQLSERVER | Yes |
| SQLSERVER | Yes |

### 2.4.5 Deleting a connection

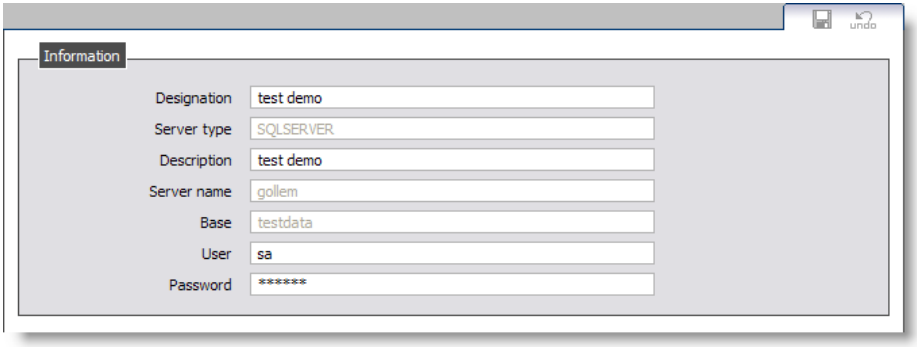
Select the element to be deleted from the list on the right and click on the button. The following message appears:



Click on the

button to confirm deletion.

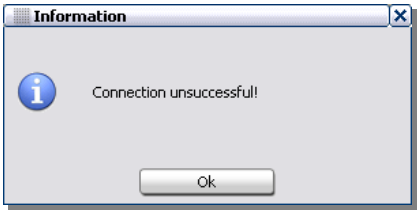
Once created, the connection's details are displayed in the lower part of the screen.

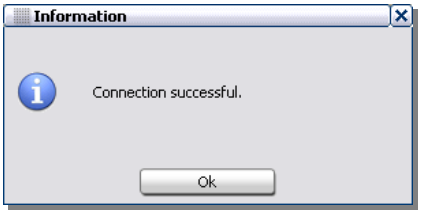



The parameters **Connection Name**, **Description**, **User** and **password** can be modified.

Upon save or restore

of the parameters shown on this screen, the connection is again automatically tested by the application. The outcome of the test is shown in a dialog box.

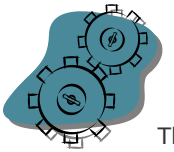


**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici.** - **Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**

**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici.** - **Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**

## ROOT HUMAN RESOURCES



This menu gives access to the administrators list. This is where the admin logins are created. Creating the login when standing on the root, will create a Master administrator, when standing on a company, you'll be creating a company admin who can only use the resources given to him by the Master administrator.

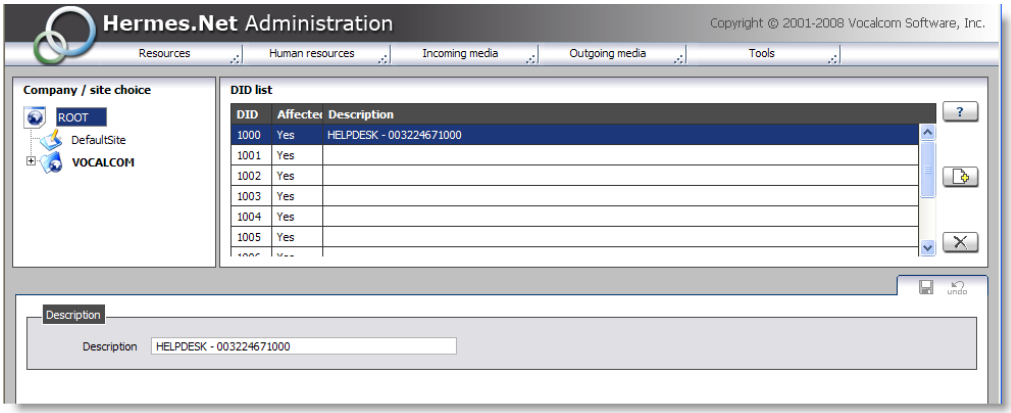
To create or delete an administrator as well as how to grant rights, please refer to page 11 of this document.

**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici.** - **Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**

## ROOT INCOMING MEDIA

## Create, delete DID

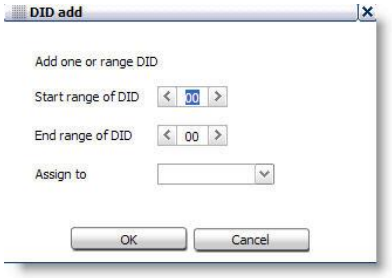
This screen allows creating the DID (Direct Inward dialling) used in defining a site's telephony parameters. Once assigned to a specific site, a DID appears with the **Yes** sign in the **Affected** column of the **DID List**




With the and buttons DID can be added or deleted.

## 4.2 Adding a DID

Click on the button to display the following dialog box.




Enter the values for the **start range** and **end range**. Enter the same value for start and end range for a DID composed of a single number. (this value is proposed as default).
The list **Assign to** allows selecting the site that will be reserved for this DID. This means that future creation of an inbound campaign into this specific site will propose only this reserved DID.

Click on

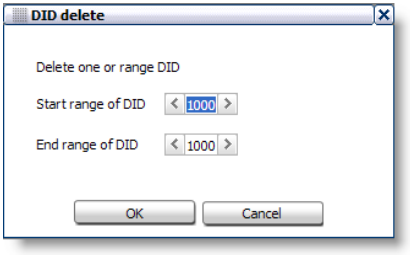
to create the element, or on

to close the window and cancel the creation.

## 4.3 Deleting a DID

Select the element to be deleted from the list on the right and click on the button to display the following dialog box:

**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici.** - **Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**




The values for “start range” and “end range” are displayed here to make sure it is this range you wish to remove.

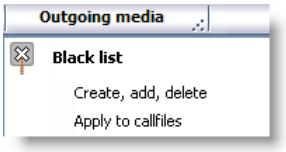
Click on the button to confirm deletion.

## ROOT OUTGOING MEDIA

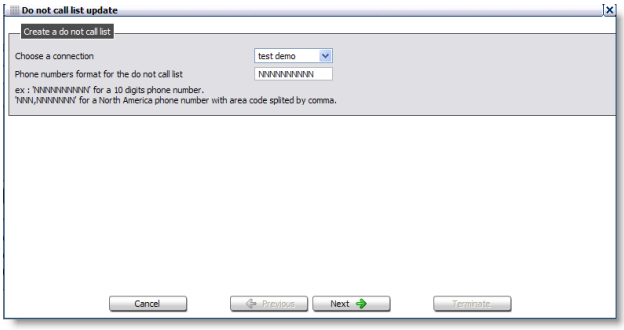
When standing on the Root, the **Outgoing Media** menu allows the administrator creating a **Black list** of phone numbers. These lists can be applied to certain callfile only to avoid calling a certain phone number on some particular campaigns.

## 5.1 Create a black list

Open the Outgoing Media menu and click on “Create, add, delete”.




The following window appears:

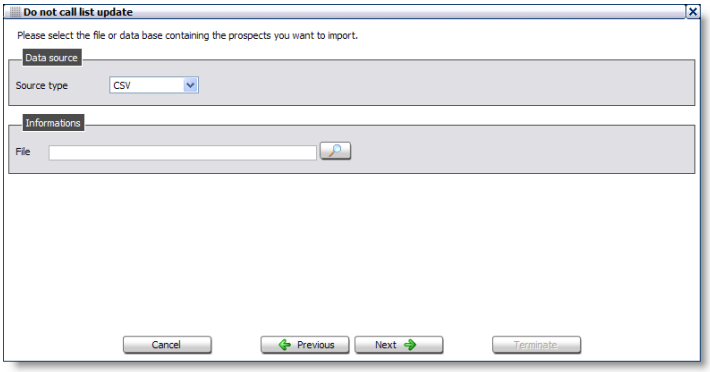

Do not call list update
Create a do not call list
Choose a connection
test demo
Phone numbers format for the do not call list
NNNNNNNNNN
ex : 'NNNNNNNNNN' for a 10 digits phone number.
'NNN,NNNNNNN' for a North America phone number with area code splited by comma.
Cancel
Previous
Next
Terminate

**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici.** - **Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**

Click on

to go to the next screen.

The following window appears:

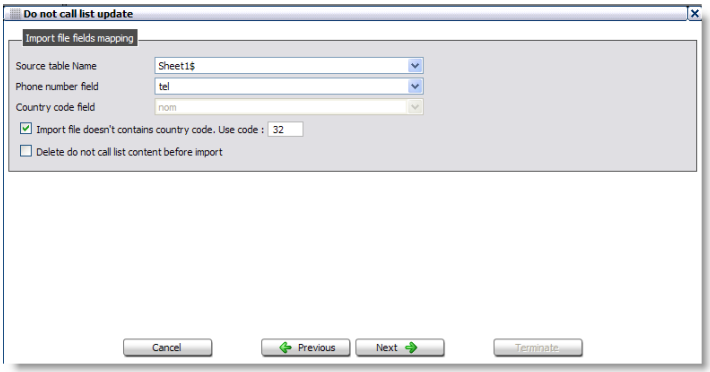



Select a **Source type** and **browse** to find the file you want to import in the **Black list.**

Click on

to go to the next screen.

The following window appears:



**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici.** - **Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**

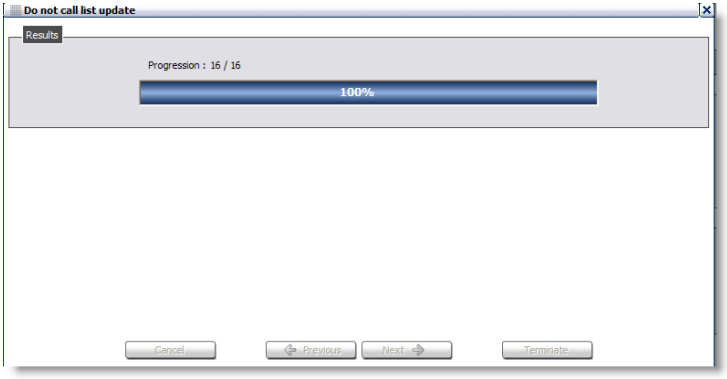
You need to select the field of the imported database that contains the Phone number.

You can also determine the country code of your region.

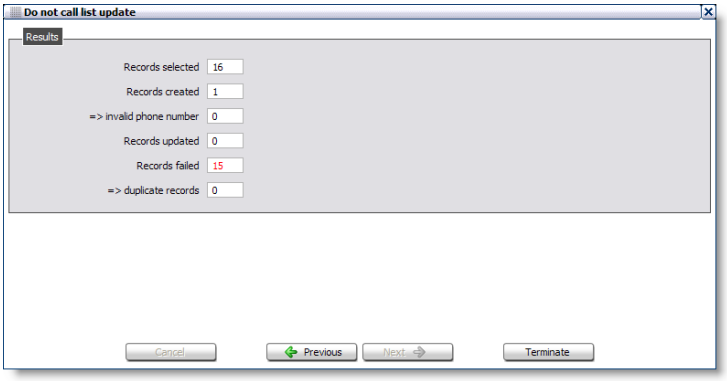
Click on

to go to the next screen.

The following progress screen should appear:




This screen is immediately followed by this window:



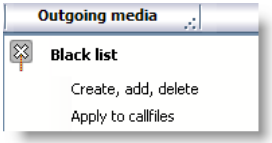
In this last window you'll see the result of the importation, you'll be notified on how many numbers have been imported and how many haven't succeeded during importation.

Press the

button to confirm the creation and go back to the main window.

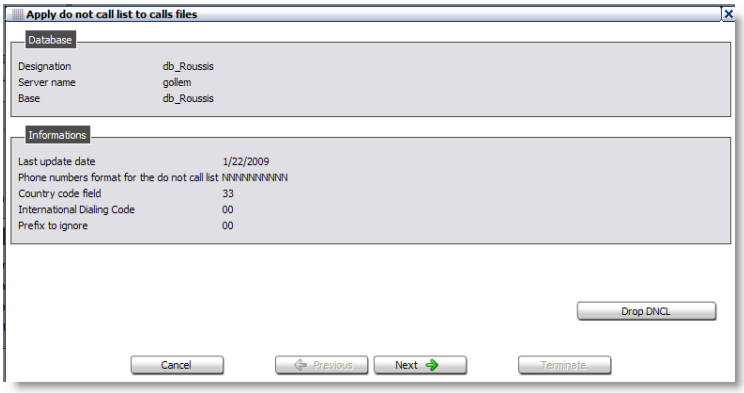
## 5.2 Applying the "Do not Call List" to a Site and to a Call file

Open the "**Outgoing media**" menu and click on "**Apply to callfiles**"




The following screen will appear:

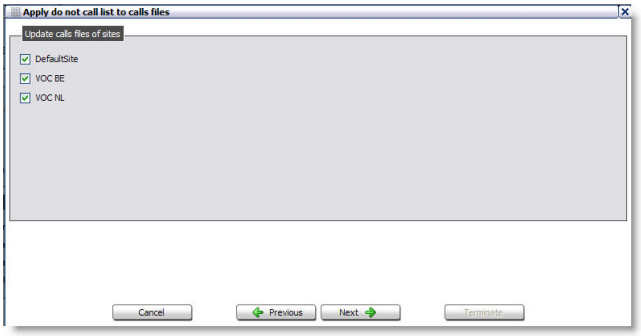
**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici. - Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**



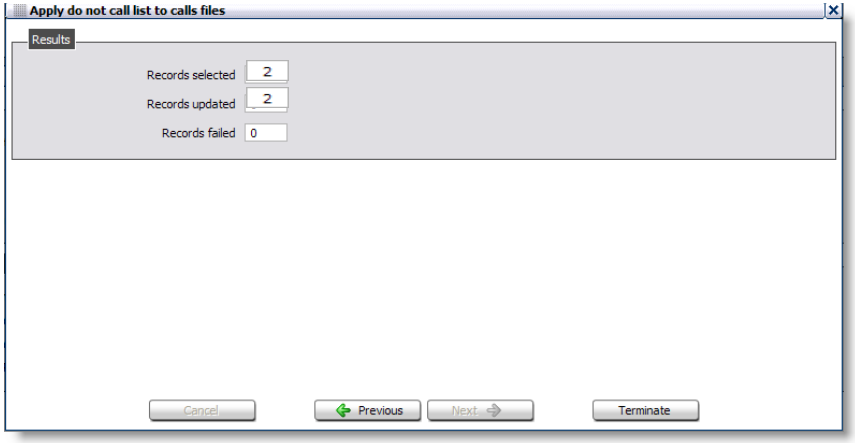

Click on to go to the next screen.


The following screen will appear:

**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici. - Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**




Select the site to which you want this “Do not call list” to be assigned to and Click on Next to go to the next screen.



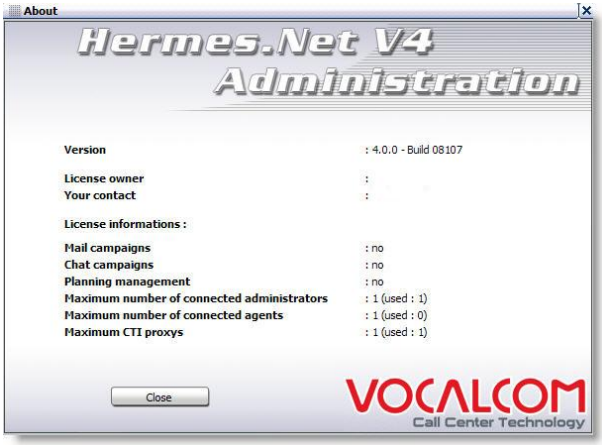

Press the Terminate button to confirm the creation and go back to the main window.

**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici. - Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**

## ROOT TOOLS

When standing on the **Root**, the "**Tools**" menu displays the following option:

Pressing the **"? About**" option will make the following screen appear:


About
Hermes.Net V4
Administration
Version : 4.0.0 - Build 08107
License owner :
Your contact :
License informations :
Mail campaigns : no
Chat campaigns : no
Planning management : no
Maximum number of connected administrators : 1 (used : 1)
Maximum number of connected agents : 1 (used : 0)
Maximum CTI proxys : 1 (used : 1)
Close
VOCALCOM
Call Center Technology

This window shows the license resources available on the platform. Only Vocalcom can upgrade or downgrade the amount of licenses.

**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici.** - **Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**

## SITE HUMAN RESOURCES

The resources are different depending on the entity selected (company or site):

At **Root** or **company** level, the menu displays only "**administrators"**.

At **Site** level, the menu gives access to configuration of **Users**, **Groups**, **Contacts**, **Planning & Holidays plan** and **Pause codes**.

## ADMINISTRATORS

This menu gives access to the "Site Administrators list. This is where the Site admin logins are created.
To create or delete an administrator as well as how to grant rights, please refer to page 11 of this document.

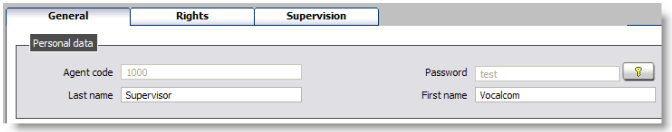
## SUPERVISORS

**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici. - Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**

The SUPERVISOR menu is used to create supervisors, attributing certain rights and giving access to Supervision groups.

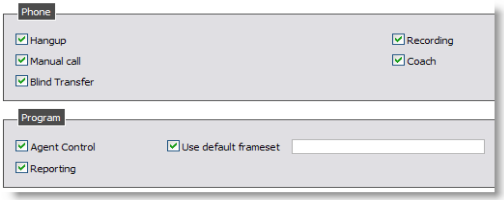
- The GENARAL tab

The user ID is grayed out, as is the password unless you press the to let the system generate a new password. First name and Last name can always be updated.




- The RIGHTS tab

Here you can change the user rights in relation with the phone and the applications (reporting or agent control (agent application)




**Phone area:**

The first area contains basic telephony functions:

- **Hangup** : hang up a call
- **Manual call**: execute a manual call

- **Blind transfer**: execute a blind transfer
- **Recording**: record calls
- **Coach**: use coach options in Supervision module

**Program area:**

The second area is concerns programs:

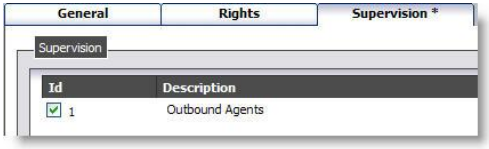
- **Agent Control**: the agent can use the Agent Toolbar application
- **Reporting** : the agent can use the Reporting application
- **Use default frameset**: this box is checked to indicate that the agent uses the frameset defined by default at the level of the Web Scripter configuration. The “default” frameset will be used if no specific frameset is defined.

- The SUPERVISION tab

In this tab the current supervisor can be assigned to a supervision group for monitoring.

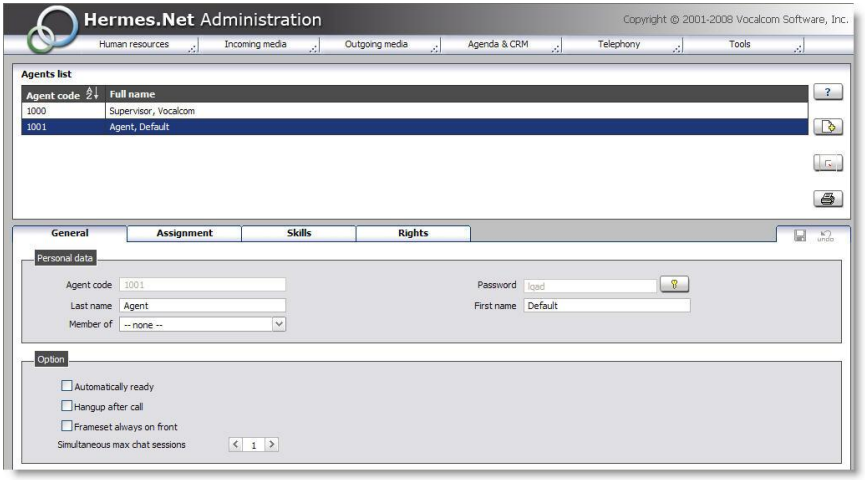
The list of Supervision groups is displayed and a checkbox lets you know to which supervision groups the supervisor is assigned to.

With the Select all button a supervisor can be included in all supervision groups in one single click.



**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici. - Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**

## AGENTS

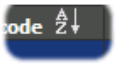


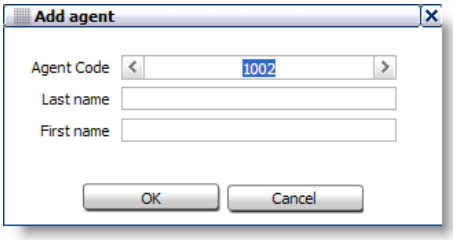

Site This window is used to manage agents assigned to a specific site. With the different tabs you can assign agents different campaigns (inbound or outbound) and rights. These tabs are discussed in more detail in the upcoming chapters.

These sreens are mainlt used for In and out.

**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici. - Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**

## CREATE A NEW AGENT

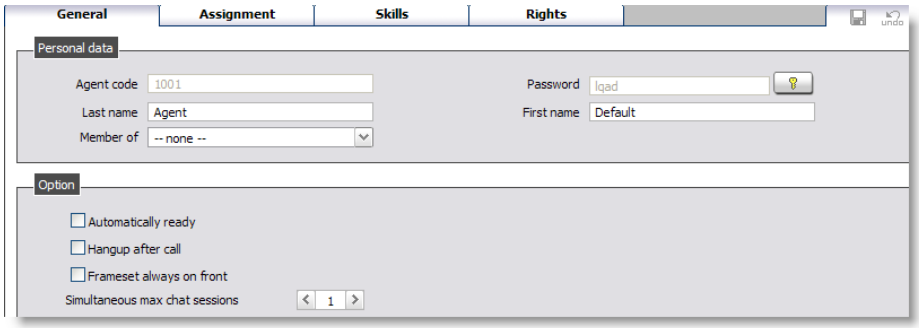
The and buttons next to the list allow you to add or delete agents.
The agents list can be sorted using the “A-Z” symbol in the column title bar. 


The first available ID is proposed in the “Agent Code” field. The system doesn’t allow agent code shorter than 4 digits.

### General tab

Use this tab to access general information about the agent.



**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici.** - **Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**

**Agent code**: to identify the agent with a unique ID.

**Password**: to change the agent's password with the button that automatically generates a random password.

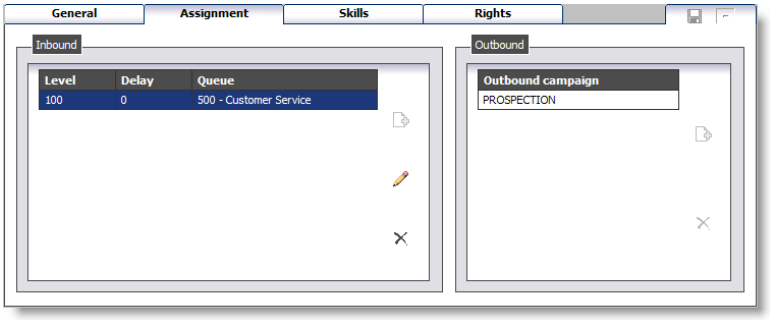
**Member of**: to link the agent to a specific agent group. When the administrator changes a parameter for the group, the changes are automatically applied to all agents within that group.

**Automatically ready**: means that the agent is automatically put in « Ready » status when connecting to the application or after having qualified the last call (if a call qualification is required of course).

**Hangup after call**: indicates if the connection between the agent and the ACD must be interrupted after a conversation. This option is usually not active when agents work with headsets.

**Simultaneous chat sessions:** Allows configuring how many simultaneous chat sessions the agent can open during a "chat campaign".

## Assignment tab



**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici.** - **Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**

This tab is used to assign an agent to one or more inbound/outbound campaigns. Use the or button to assign or delete an inbound/outbound campaign.

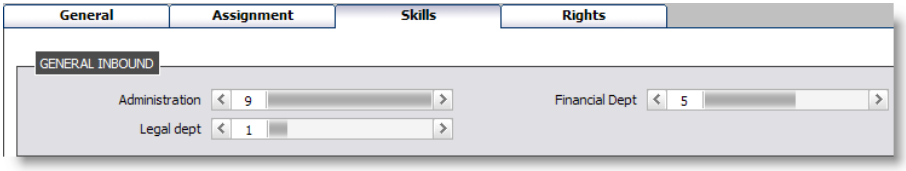
The **Inbound** area represents the queues attributed to the agent. You see 3 colums: **queue**, the **level** of the skill and the **delay** in seconds. The level and delay can be modified using the button.

**Level**: used to assign an agent's competence level for that particular queue. The maximum value is 100; the minimum 0. The ACD server always sends the call to the highest skill level.

**Delay**: with this parameter expressed in seconds you can manage call distribution differently. An agent with value « Delay » more than 0 will not be assigned a call of that queue if the call has not been in the queue for long enough (delay defined here). This delay gives other agents a chance to free themselves to receive that call.

## Skills tab

This tab shows details on the agent skill level. A specific profile can be affected to an incoming call or mail when entering the campaign. Agents also receive a profile according to their level of knowledge. The call will wait in the queue until an agent with the right profile of the campaign becomes free.

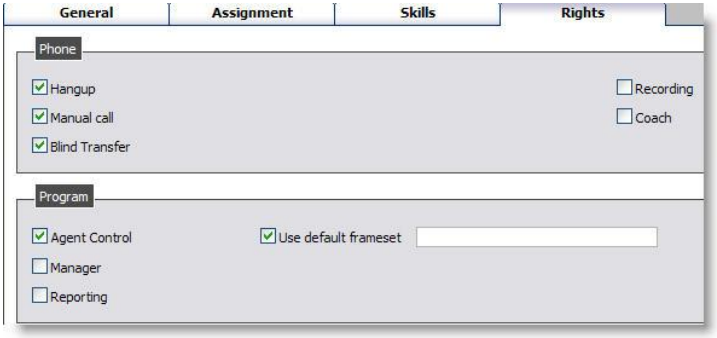



Each slider corresponds to a profile.

The exact level of the cursor (0 to 9) is displayed in the little box at the right of the skill description. See « AGENT SKILLS**Erreur ! Source du renvoi introuvable.** » after this chapter.

## Rights tab

The administrator can define for each agent, which telephony function(s) and program(s) he has access to.




**Phone**

The first part contains basic telephony functions:

- **Hangup** : hang up a call
- **Manual call**: execute a manual call
- **Blind transfer**: execute a blind transfer
- **Recording**: record calls
- **Coach**: listen to calls

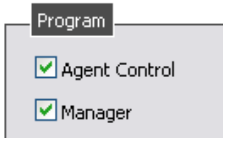
**Program**

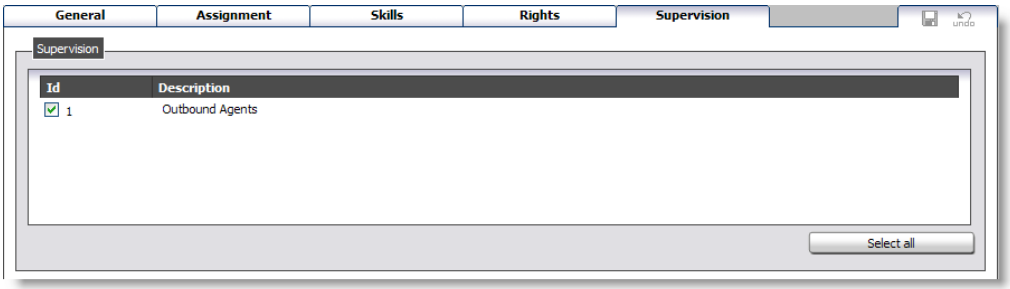
The second part is about programs:

- **Agent Control**: the agent can use the Agent Toolbar application
- **Manager**: the agent can use the Supervision application. When this box is checked, the Supervision tab is visible.
- **Reporting** : the agent can use the Reporting application
- **Use default frameset**: this box is checked to indicate that the agent uses the frameset defined by default at the level of the Web Scripter configuration (See section « **Erreur ! Source du renvoi introuvable.** » on page **Erreur ! Signet non défini.**). The "system" frameset will be used if no specific frameset is defined at any places.

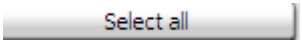
## Supervision tab

This tab is only visible if the agent in question has been defined as **Supervisor** in the **Rights** tab (Check box **Manager**).



In this tab the current Supervisor can be assigned to a supervision group for monitoring.
The list of Supervision groups is displayed and a checkbox lets you indicate if a supervisor has access to this group.

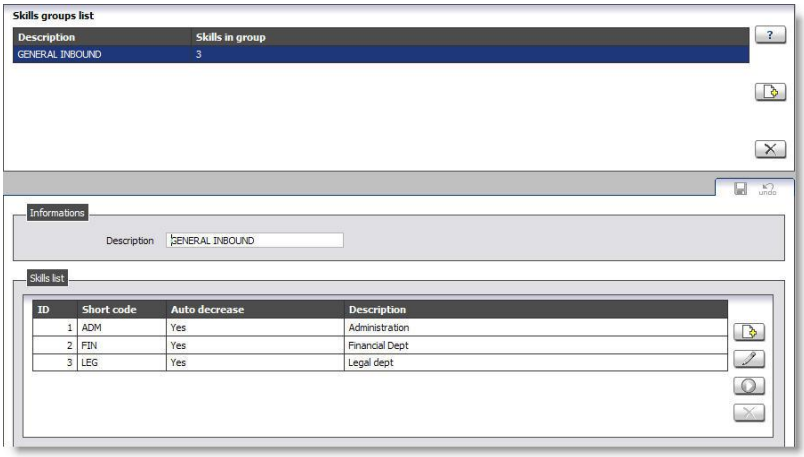
With the 

button an agent can be included in all supervision groups in one single action. This is where it gets good.

## AGENT SKILL GROUPS

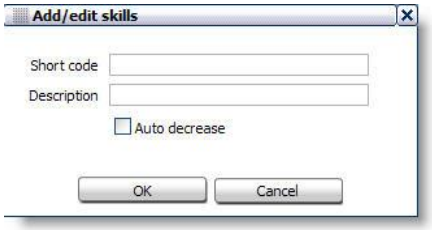
This tab allows creating and configuring profiles used to define agent and campaign SKILLS. A specific profile can be affected to an incoming call or mail when entering the campaign. Agents also receive a profile (see on page 63) according to their level of knowledge. The call will wait in the queue until an agent with the right profile of the campaign will become free.

**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici. - Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**




- Create AGENT SKILLS GROUP

The next window appears if you press the “create button” :




The and buttons on the right let you add or delete skills. In the **Skills list**, each skill is represented by a unique identifier **ID** assigned by the system that cannot be changed.

A **Short Code** composed of 3 characters allows you to give an abbreviated description of the profile.

**Description**: to enter a description for the profile.

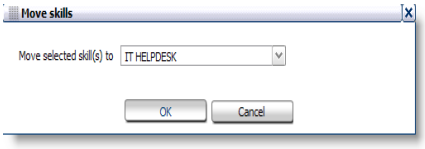
**Auto decrease**: to automatically lower the level of the profile in question in the agent profile it constitutes.

- Edit SKILL

You can edit the skill by pressing the **edit** button:

- Move SKILL to another Group

You can move the skill to another Group by pressing the **Move** button:

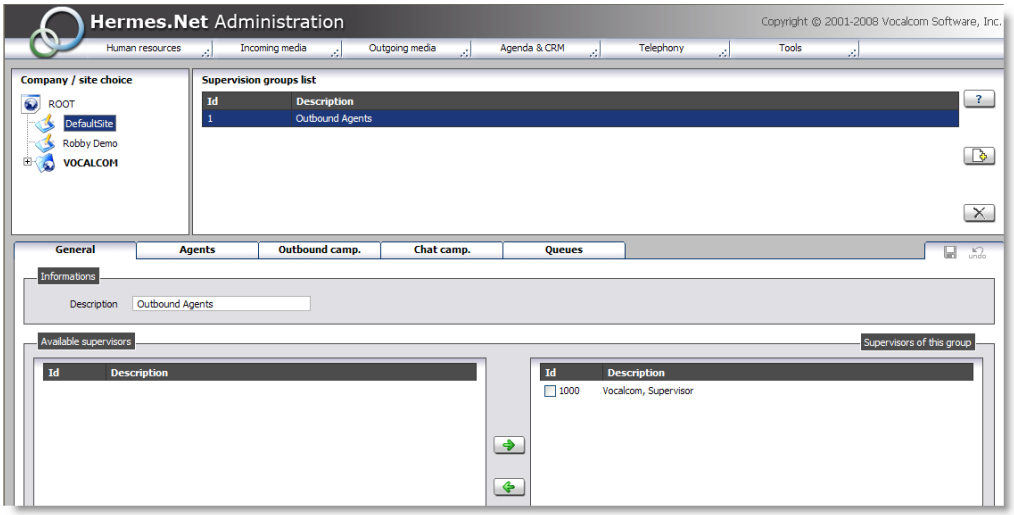



Choose the group to which you want the skill to move into and press **OK**.

## SUPERVISION GROUPS

**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici. - Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**

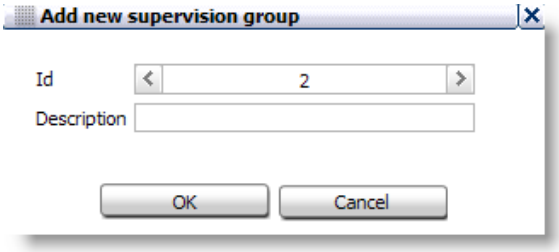
With the « Supervision Group » window you can define a group of elements (agents, campaigns, chat campaigns and queues) that are assigned to one or more supervisors. The purpose is to create a filter available in the supervision module. When activated by the supervisor, the different windows will only show the resources that are part of the group(s). The agents or campaigns that are not part of the group will simply disappear.



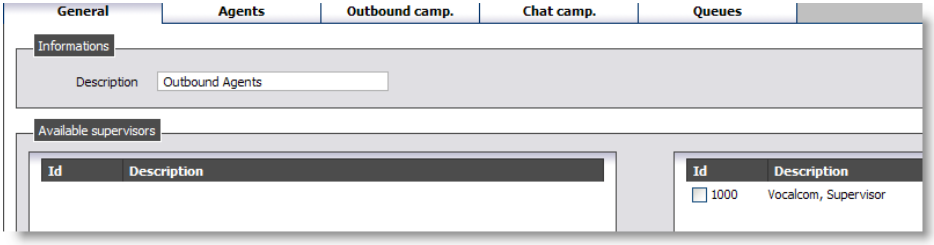

Each group is identified by a unique **ID** number assigned by the system.

Groups can be added or deleted with the and buttons.

**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici. - Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**




## General tab




This tab allows you to update the name of group and also assign supervisors.
This tab shows the agents defined as supervisors on the left side and the supervisors assigned to the group on the right side.

The first column **Id** shows the supervisor's identifier and a checkbox. The **Description** column shows the name of the supervisor.
To assign one or more supervisors to the selected group, check the box in front of the agent in question and click on to move it to the right.

**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici.** - **Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**

To remove a supervisor from a group, check the box next to its name in the list on the right side and click on .

- **Agents tab**

This tab displays the available agents on the left side and the agents assigned to the current group on the right side

The first column **ID** gives the agent's identifier and a checkbox. The **Full name** column shows the agent's first and last name.

To assign one or more agents to the selected group, simply check the boxes in front of the agents and click on to move them to the right side.

To remove an agent from the group, check the box in front of the agent in the list on the right side and click on .

- **Outbound Campaigns tab**

This tab shows the existing campaigns on the left side and the campaigns assigned to the group on the right side.

The first column **Id** shows the campaign's identifier and a checkbox. The **Description** column shows the name of the campaign.

To assign one or more campaigns to the selected group, check the box in front of the campaigns and click on to move them to the right.

**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici.** - **Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**

To remove a campaign from a group, check the box next to its name in the list on the right side and click on .

- **Chat Campaigns tab**

This tab shows the existing “Chat campaigns” on the left side and the campaigns assigned to the group on the right side.

The first column **Id** shows the campaign’s identifier and a checkbox. The **Description** column shows the name of the campaign.

To assign one or more campaigns to the selected group, check the box in front of the campaigns and click on to move them to the right.

To remove a campaign from a group, check the box next to its name in the list on the right side and click on .

- **Queues tab**

This tab displays the existing queues on the left side and the queues assigned to the current group on the right side.

The first column **Id** shows the queue’s identifier and a checkbox. The **Description** column shows the name of the queue.

To assign one or more queues to the selected group, check the box in front of the queue in question and click on to move it to the right.

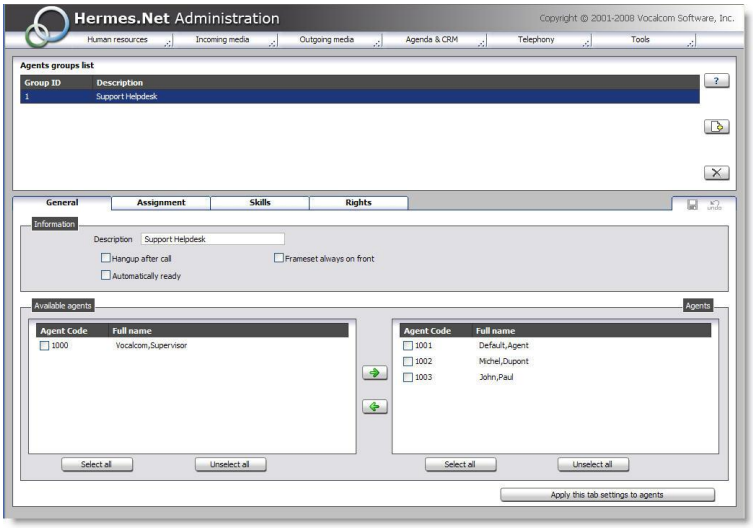
To remove a queue from a group, check the box next to its name in the list on the right side and click on .

## AGENT GROUPS

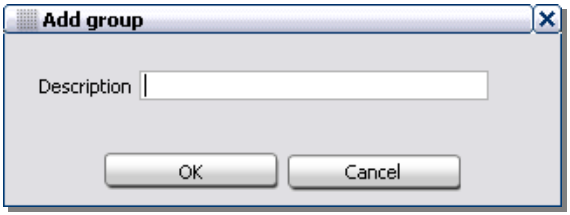
The « Agent Group » window is used to configure multiple agents in one single action. The administrator will thus group the agents with similar skills. The Agent Group is configured the same way as the “Agent”. The different tabs are exactly the same. The only difference is that you configure a group of agents instead of configuring a single agent. Use the general tab to add agents in the group.

Please refer to the Agent configuration chapter (page 60) to learn how to configure the “Agent group”.

**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici. - Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**




Each group is identified by a unique numeric **group ID** assigned by the system. Groups can be added or removed with the and buttons on the right.

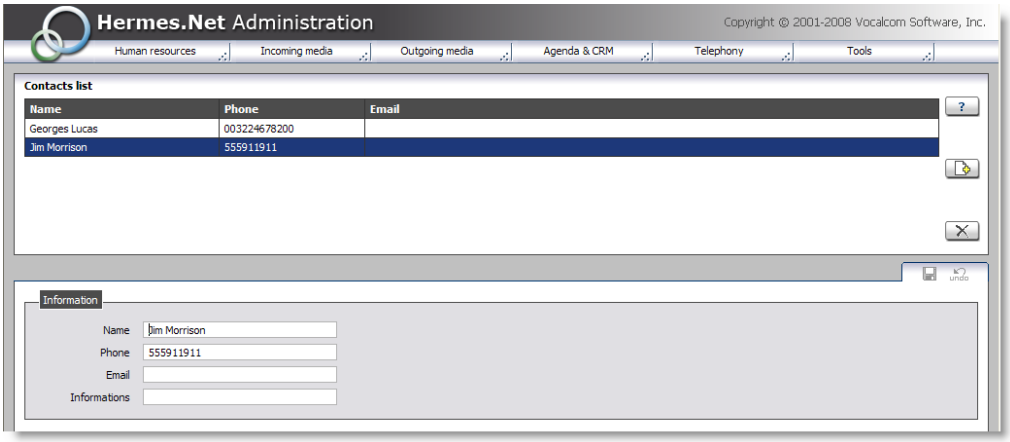


At the bottom right side of the screen, the button lets you apply the changes made to that particular tab only. If an agent has a certain skill that does not appear in the skills defined for the group, this particular skill is not removed. It is possible to assign additional skills to an agent without having to create a new group.

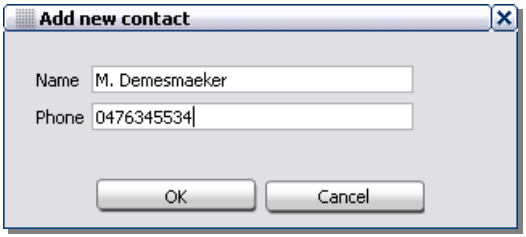
## CONTACTS

The “Contacts” screen allows managing a list of contact persons that can be common to the whole site. They can be used by all the site agents for future calls transfers.

**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici. - Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**




Contacts can be added or removed with the and buttons on the right.




A contact is only identified with a name and a phone number.

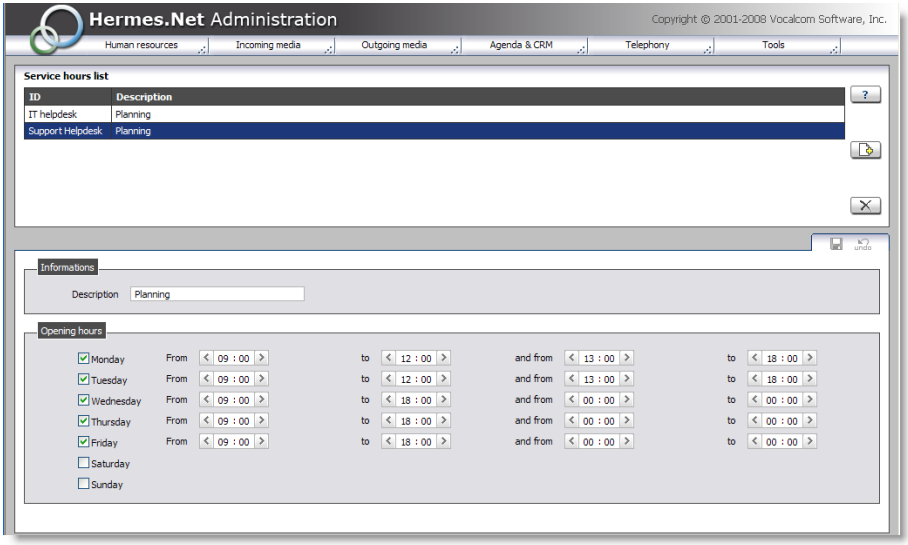
## PLANNING & HOLIDAY PLAN

This chapter describes how to create and configure service hours and holiday plans (the campaign's opening hours).

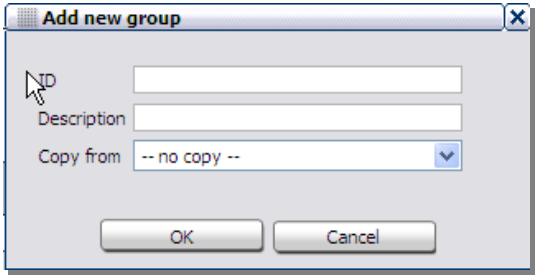
## SERVICE HOURS

The service hours let you define the call center's opening hours.

A service hour schedule is identified by an **ID** and a **Description**.


Hermes.Net Administration
Copyright © 2001-2008 Vocalcom Software, Inc.
Human resources
Incoming media
Outgoing media
Agenda & CRM
Telephony
Tools
Service hours list
ID
Description
IT helpdesk
Planning
Support Helpdesk
Planning
Informations
Description
Planning
Opening hours
Monday From 09 : 00 to 12 : 00 and from 13 : 00 to 18 : 00
Tuesday From 09 : 00 to 12 : 00 and from 13 : 00 to 18 : 00
Wednesday From 09 : 00 to 18 : 00 and from 00 : 00 to 00 : 00
Thursday From 09 : 00 to 18 : 00 and from 00 : 00 to 00 : 00
Friday From 09 : 00 to 18 : 00 and from 00 : 00 to 00 : 00
Saturday
Sunday

With the and buttons on the right side, you can add or delete service hours.




When creating a new service hours schedule, you can use the data of a schedule already defined by selecting its ID in the **Copy from** list.
The **Description** value gives the schedule a name.

The window displays checkboxes for each day of the week. Checking one or more of these boxes indicates that the campaign will run on those specific days.

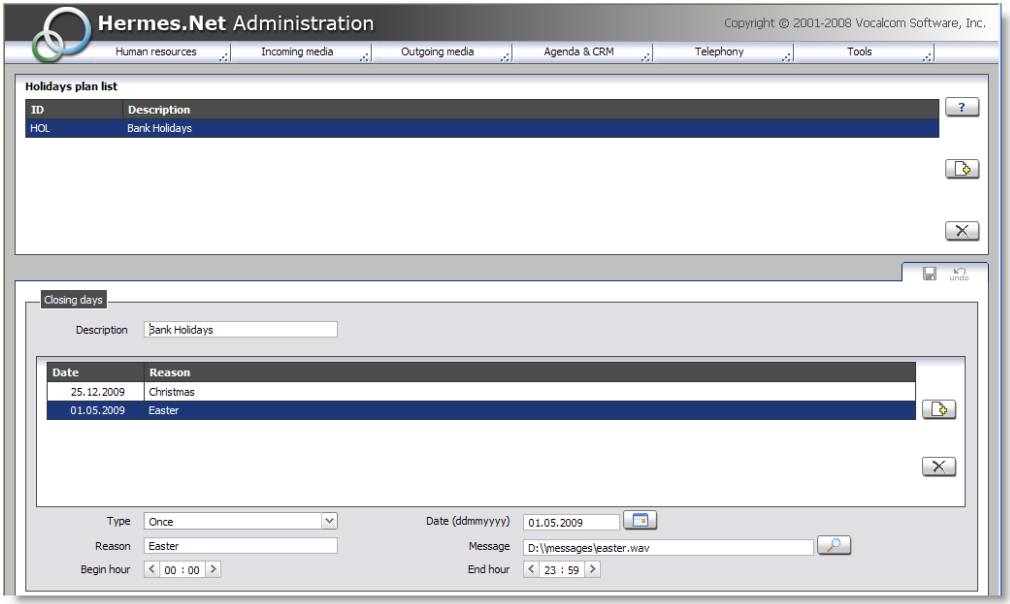
For each day, 2 time intervals can be selected.

The service is considered as 'open' when a call arrives on a day that has been checked in the service hours schedule and on an hour that falls between the intervals indicated.

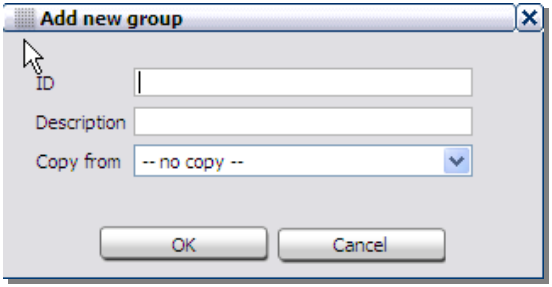
## HOLIDAY PLAN

In this window you can define the campaign's closing time.

The calendar is thus assigned to a campaign as described in chapter « Opening tab » on page 96. A calendar is identified by an **ID** and a **Description**.




With the and buttons on the right side you can add or delete calendars.




When creating a new holiday plan, you can use the data of a schedule already defined by selecting its ID in the **Copy from** list.

The **Description** value gives the holiday plan a name.

The **Closing days** field shows the days defined as days during which the service is closed. If the **Date** field does not contain a year, the event is repeated annually on the same date.

Dates can be added or deleted with the and buttons.

To modify a date in the list, simply complete the fields below it:

**Type**: indicates if the event is unique (**once**) or **recurring**.

**Date (ddmmyyyy)**: to choose a date by entering it directly or selecting it from the calendar window, accessible through the button.

**Reason**: to describe the event.

**Message**: to link a specific audio file to the date. By clicking on the button you can select a message from the list of audio (.wav) files on the ACD server.

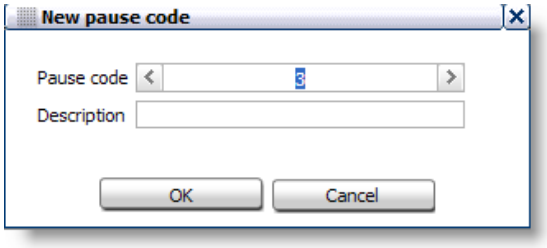
**Begin/end hour**: allows specifying begin and end time of the closing period (example: a closed afternoon will begin at “12:00” and end at “23:59”).

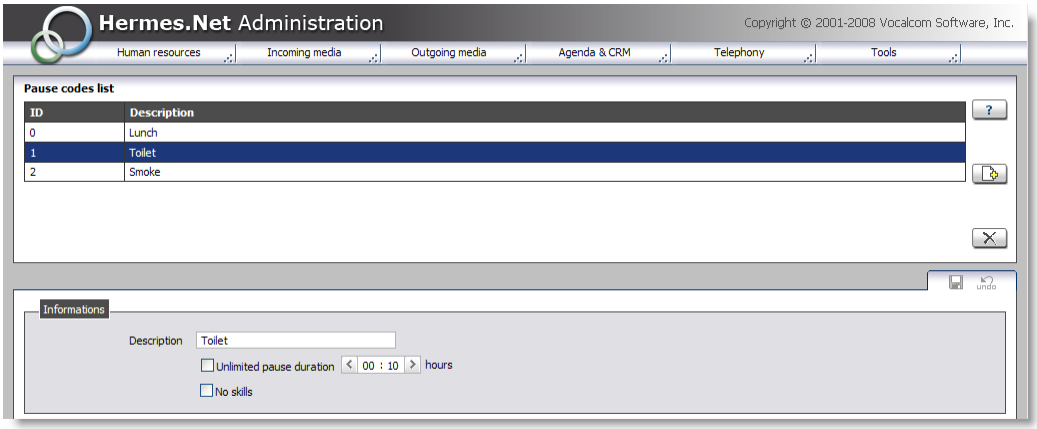
## PAUSE CODES

A new code can be added or deleted with the and buttons.

Just enter an ID and a description. These pauses will be proposed to the agent when a call is completed.

**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici.**

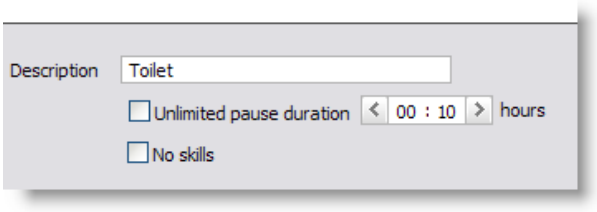



**No skills** : check this box to suppress the agent skills during this pause. At this moment the ACD will consider that the agent is not longer connected and the supervisors won't see him anymore in the default agent's supervision window.

**Unlimited pause duration**: this option allows setting up a time limit to a Pause code.

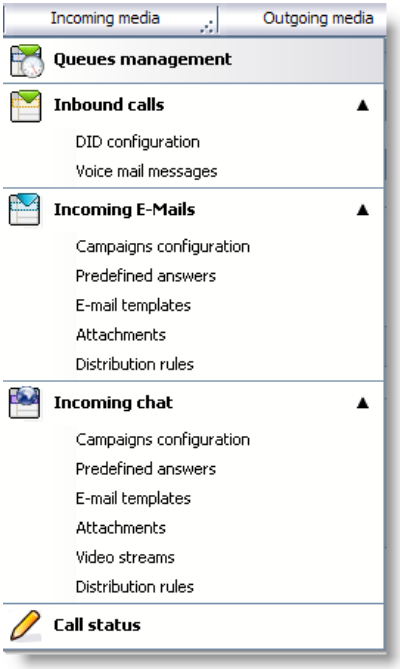
**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici.**



**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici.**

# INCOMING MEDIA

This chapter describes how to configure your “Queues”, “Inbound call campaigns”, “Mail campaigns”, “Incoming chat campaigns” and “Call statuses”.



# QUEUES MANAGEMENT

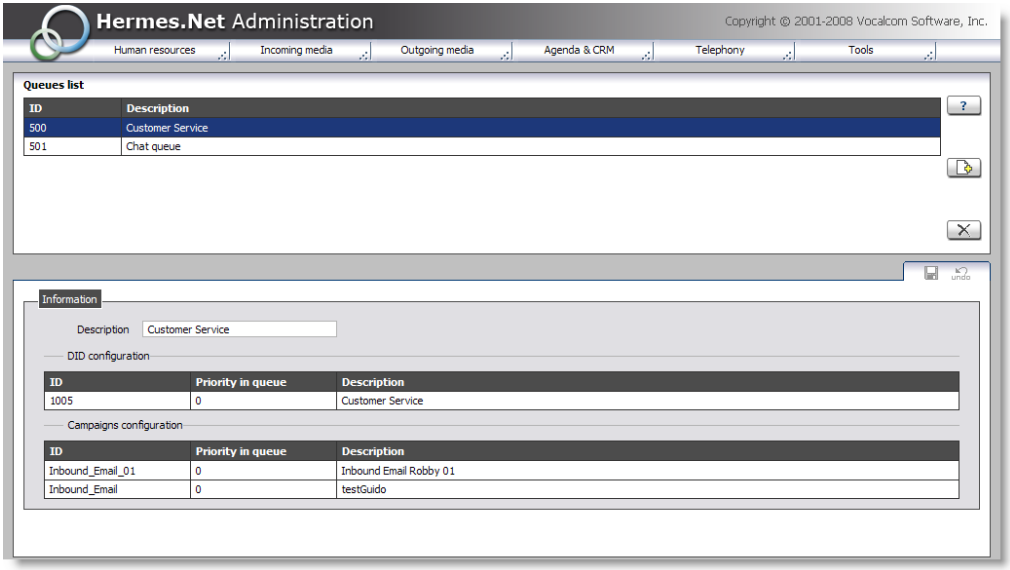
The queues are a mandatory component of the inbound campaign because in the Vocalcom system, agents are actually linked to queues and not to campaigns,

This window allows you to manage the different QUEUES, used in inbound, email, or chat campaigns. All required queues must be defined here.

Use the and buttons on the right side of the screen to create new Queues.

By creating a queue, the administrator defines the skills corresponding with the level of agents

.




The top side of the window shows the list of queues defined on the system. It contains a unique numeric **ID** composed of 3 characters (beginning with value 500) and the name repeated under **Description**.

**Description**: indicates a text to identify the queue. This description also appears during agent configuration.

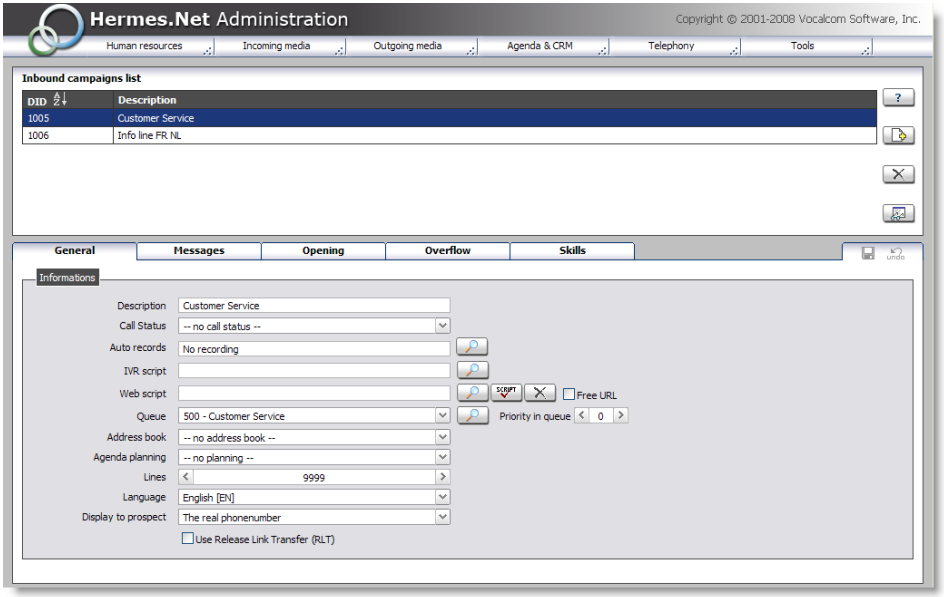
The information part at the bottom of the screen shows all campaigns to which a certain queue is attached to. Clicking on the queue in the “information part”, will bring you to the campaign to which this queue is linked.

## DID Configuration / Inbound campaigns

First of all, an **inbound campaign** is a phone number to which customers call (ex: 0800... = Customer service) in order to have a phone discussion with a customer service representative. The **DID** (Direct inward dialling) is the ID of your inbound campaign, each inbound campaign has it’s own unique DID. Usually we choose the DID based on the 4 last digits of the Inbound call number used for the campaign.
An inbound campaign is the addition of different components which purpose is to welcome the customers and keep the contact as professional as possible from the reception until the hang-up. As soon as the call is received in the Vocalcom System, the call will be sent in a waiting queue linked to that particular campaign. An IVR script (Interactive Voice Recognition) can be defined on the campaign, welcome messages (.wav) can be played, setting up opening hours and holiday plan, choosing overflow procedures, etc. All these options are to be configured in the 5 tabs below:

- **General**: to change the global configuration of the selected campaign (description, voice script, queue…)
- **Messages**: to configure audio files (wav) used during call handling.
- **Opening**: to define service opening hours and days, as well as the audio file played when calls arrive during closing hours.
- **Overflow**: to configure overflow strategies.
- **Skills**: to define the profile settings for this campaign.

This next window displays the inbound campaigns defined on the system. The inbound campaigns list shows all campaigns for this site.



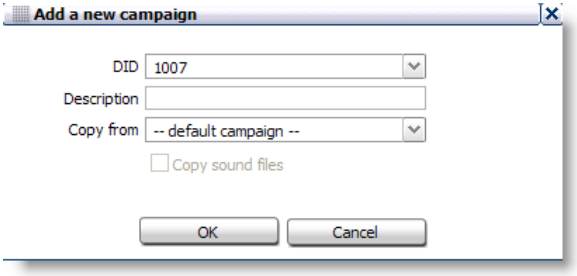

The **DID** column contains the campaign's unique identifier.

The column **Description** contains a name that describes the campaign.

Use the and buttons on the right side of the screen to create or delete campaigns.

You can only create a campaign if at least **one DID is defined and available** on the system. See section « Create, delete DID » of chapter « ROOT » on page 48 for information on how to create a DID.

Clicking on the button displays the following window: If no DID is available, a pop-up appears with the message "No DID available".



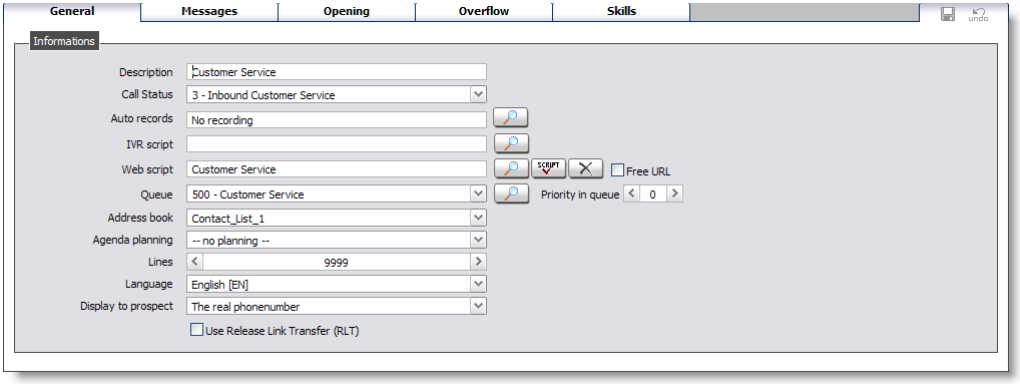

The non-assigned DID are shown in the **DID** list.

In this window you must type the campaign name (**Description**). With the **Copy from** list you can select a campaign previously created and take its parameters as a basis to define those of the new campaign. **Copy sound files** can be check to mention that the audio files set in the other campaign can also be copied into this new campaign.

Clicking the button will bring up the **Campaign Graphic View** window. See section « Campaign Graphic View » on page 102 for a description of this window.

It allows you to quickly show missing or wrongly defined elements that cause the campaign to function incorrectly or not at all.

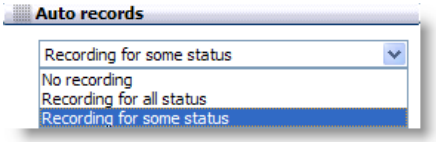
## General tab



**Description field**: contains the name of the inbound campaign which can always be changed.

**Call Status field**: displays and lets you select the group of qualifications for each campaign individually. The call qualification group is defined in the “Call Status” menu option of the Incoming Media menu.

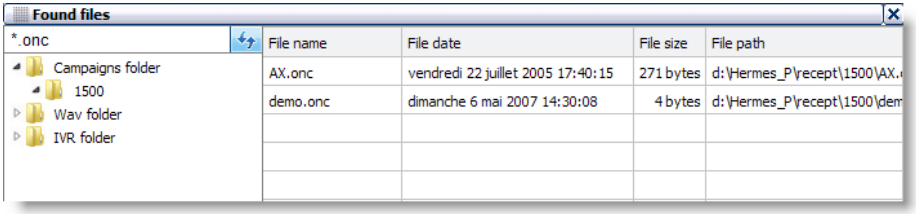
**Auto Recording:** this option allows you to automatically record the conversations received on this campaign. Press the button and the following screen will appear:




Here you can choose to record all calls or you can also choose only certain call statuses for recording.

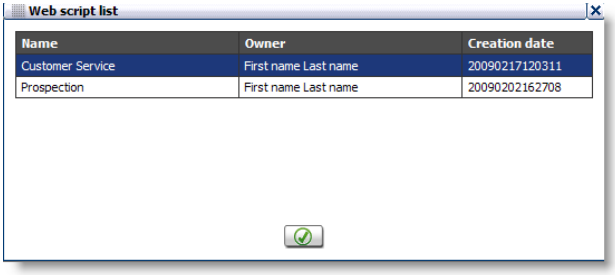
**IVR Script**: indicates the path to the IVR used in this campaign (file with extension « onc »).

With the button you can list files of the same type in a particular directory on the server defined during configuration. The files found are displayed in tree diagram layout.




**Web script:** to indicate the path to a web script displayed during call handling.

Use the button to open a dialog window with the list of available scripts.




Select the web script to be used from the list and click on .

The button can be used to execute the script. The button can be used to cancel and remove the script name.

**Queue field**: displays the queues defined on the system and lets the administrator select the queue towards which the calls should be directed when entering the campaign (see chapter« **Erreur ! Source du renvoi introuvable.**» on page 80 for more information on queue definition). The button can be used to open a queues management pop-up.

Buttons and can be used to add or remove queues. The button allows editing the selected queue details.

**Priority in queue**: to define the priority of calls in the waiting queue. The higher the value (in seconds) the more prioritised is the queue. Actually by adding a certain amount of priority, you're adding extra waiting time to the call received on that queue, which makes it more prioritised compared to another queues without any priority.

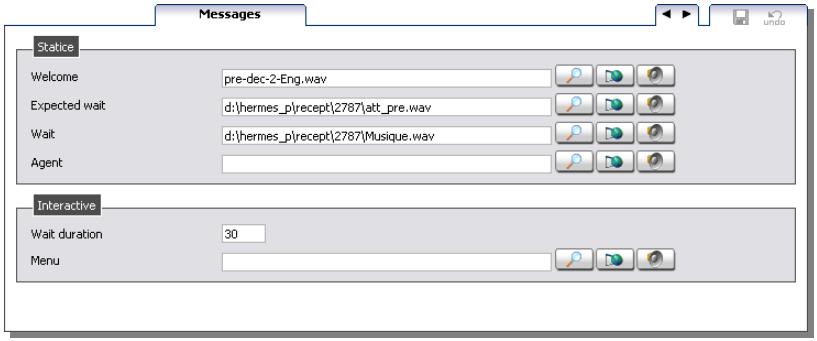
**Address book**: is used to link an "Address book" created in the "Agenda & CRM" menu of the administration module (explained later in this documentation). This address book will be visible by the agent when creating a new appointment.

**Agenda planning:** used to define an "Agenda" to the campaign. The agenda is created using the Agenda option of the "Agenda & CRM" menu (explained later in this documentation).

**Lines**: indicates the maximum number of calls the ACD can treat simultaneously. All calls above that number are rejected.

**Language**: displays the suffixes defined in the variable Onnet $AcdLanguage, and lets you define the default suffix that will be added to the name of the audio files.
(See User Manual IVR Editor for more information).
**Display to prospect**: allows defining which outgoing phone number will be displayed when manually calling from the campaign.

### Messages tab




In this window, the administrator can define the different audio files played while a call is being queued, as well as the audio file the agent can hear at the moment a call arrives.
If the administrator does not want to define a specific voice message, he simply leaves these fields empty.
For each field, you can either directly enter the path & name of the file or select it from an explorer window by clicking the button: once selected, the file is put on the server that contains the ACD in one of the campaign's directories.

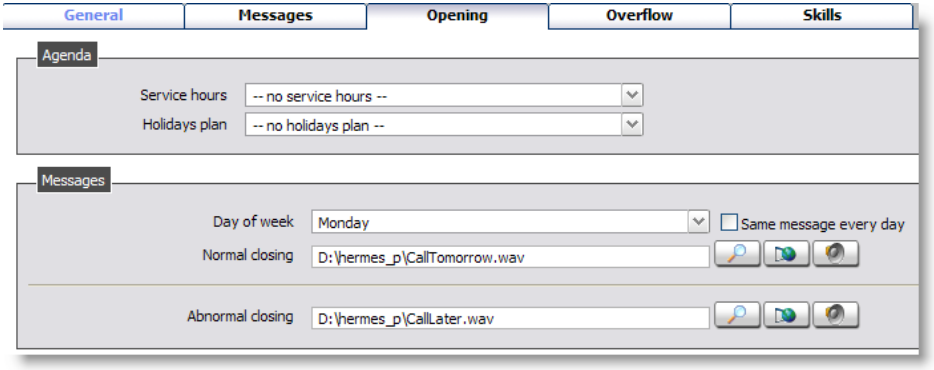
The button displays all files of the audio type (.wav) on the ACD server. The files found are displayed in tree diagram layout.

With the button you can play the audio file indicated in the corresponding field. Note: heavy files may take some time to be launched.

**Welcome**: the voice message to be played when a call arrives in the queue.
**Expected wait**: the message played to indicate the approximate waiting time before call handling. This message is usually something like « The waiting time is », followed by an automatically generated message from the system.
**Wait**: the message or music to be played while a call is waiting in the queue.
**Agent**: the message the agent hears when a call is being transferred to him. This has to be a very short file, typically a beep, because the call is already connected at that moment.
**Interactive Menu**: an audio file or an IVR script that offer the customer the possibility to come out of the waiting queue and to be transferred to the chosen "overflow procedure" as configured in the "Overflow tab". When the message, indicated in the "Menu" Field" is played, the customer only needs to press digit "1" on the keyboard of the phone, to be re-directed towards the overflow procedure.
**Wait duration**: time between two replays of the "Menu message" in the Interactive menu. (See chapter « Annex » for information on the repetition of waiting intervals on page?)

### Opening tab

In this tab you can define the time schedule of the campaign, as well as the voice messages (normal closing) to be played when a call is received outside the hours declared in the group. You can also define the emergency message here (abnormal closing).
**Service hours**: shows a list of all the "opening hours" groups. The service hours groups are defined in the Incoming Media menu, as described in section « **Erreur ! Source du renvoi introuvable.** » on page 75)
**Holidays plan**: to define the closing time schedule. See section « **Erreur ! Source du renvoi introuvable.** » on page 76**Erreur ! Signet non défini.** for more information.
Once you have defined the service's opening hours, you can configure the audio files to be played during closing time. For each field, you can enter the way and field name directly or open an explore window with the button and select it: once selected, the file is transferred to the server that contains the ACD, in one of the campaign's directories.




The button lists all audio files (.wav) on the ACD server and displays them in tree diagram layout.

With the button you can play the sound file indicated in the corresponding field. Note: heavy files may take some time to be launched.

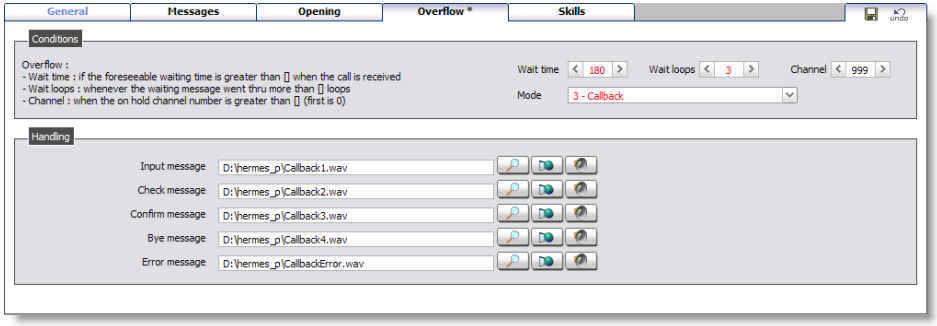
**Day of week**: select the day and the message to be played. If the box **Same message every day** is checked, the message is the same for all days of the week. This option is defined by default.

**Normal closing**: indicates the message that is going to be played when the call center is closed.

**Abnormal closing**: indicates the message to be played during an emergency. If no agent is connected to the system but the campaign is open, all calls entering the campaign will hear the “abnormal closing message”.

## Overflow tab

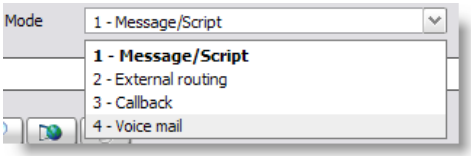
In this tab you can define the Overflow strategy and conditions for the activation of the overflow. The overflow is basically a way of taking charge of the excess calls that can’t be handled in time because all agents are busy.



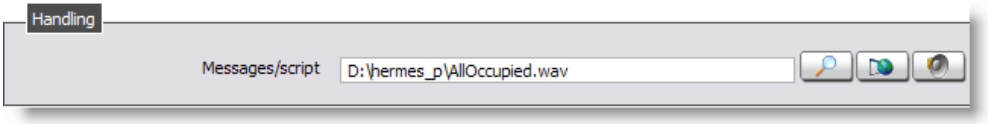

The **Conditions** are used to configure when the overflow will activate itself. Three parameters are taken into account and when one of the parameters is met, the system will redirect the call to the overflow procedure.

**Expected Wait time**: the first condition to send the call in overflow is the “expected wait time” (in seconds) in the queue. The call will go in overflow, immediately after entering the queue if the expected waiting time of that particular queue exceeds the value indicated in this field.
**Wait loops**: sends the call in overflow when the maximum number of waiting time loops is played. A **loop** is the addition of the following messages (when used) of the “Messages tab”: Expected wait time + Wait + Interactive menu.
**Channels**: represents the maximum number of calls that can be treated simultaneously for that specific campaign. All calls exceeding that value are redirected to the overflow procedure.

The **Handling** tab lets you configure the actions to be executed in overflow mode. The strategy is defined by selecting one of the available options from the « **Mode** » field.



### « Message/script » Mode




This is the simplest strategy, playing an audio file or executing an IVR script.

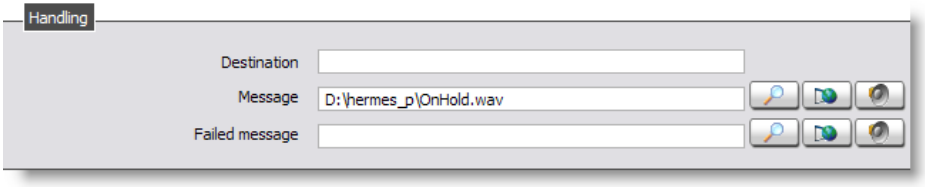
The **Messages/script** field indicates the name of the selected file.

You can either directly enter the file path and name or select it from an explorer window with the button: once selected, the file is transferred to the server that contains the ACD in one of the campaign's directories.

With the button you can display the list of audio files (.wav) on the ACD server. The files are displayed in tree diagram layout.

The button allows you to play the audio file indicated in the corresponding field. Note: heavy files may take some time to be launched.

### « External routing » Mode




This mode is used to redirect the call to another destination.

**Destination**: type here the phone number to which the call should be forwarded.

**Message**: is used to indicate the voice message to be played to the customer during the rerouting.

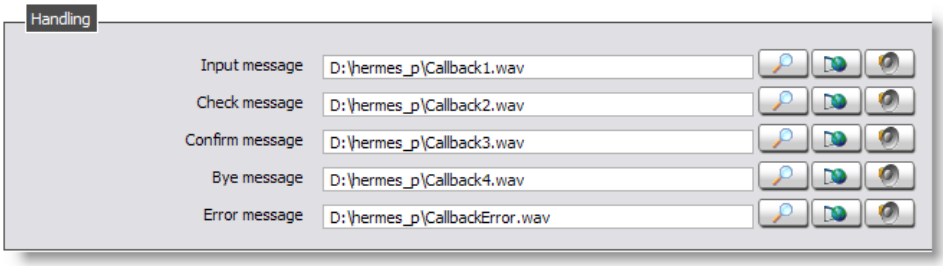
**Failed message**: indicates the voice message to be in case the call can't reach the destination number due to technical problems (Network failure, all lines busy…). You can either directly

enter the file path and name or select it from an explorer window with the button: once selected, the file is transferred to the server that contains the ACD in one of the campaign's directories.

The button displays all audio files (.wav) available on the ACD server, presented in tree-diagram layout.

The button lets you play the audio file in the corresponding field. Note: heavy files may take some time to be launched.

### « Callback » Mode




During this overflow procedure, the customer is asked to enter a phone number using the DTMF keys of the phone's keyboard. When the number is confirmed, it is registered for automatic callback. The ACD server (Automatic call distribution) will call that number during a quiet moment of the day (when less waitings in queue), and will present this call to an agent capable of answering calls of that particular campaign. All the messages explained below are already recorded in many languages (Italian, German, French, etc). Press the button to select the language and message you need to use.

**« Input message »**: the name of the file to be played when asking the customer to enter his phone number.

**"Check message"**: the message to repeat the customer's number for verification. This message is automatically followed by a repetition of the number.

**"Confirm message"**: explains which buttons to use to go back to the previous step and enter the number again (in case of error) or to continue.

**"Bye message"**: the last message confirming that the number has been successfully registered for callback.

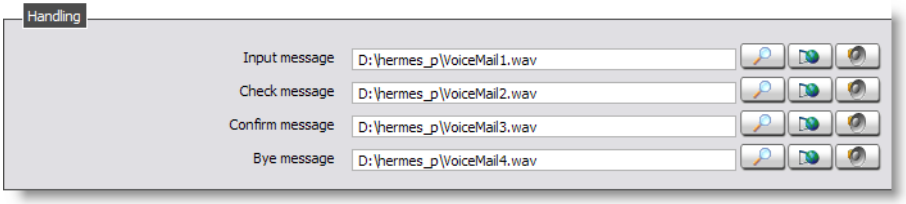
**"Error message"**: the error message to be played when the number entered by the customer is not correct.

For each field it is possible to directly enter the file path and name or to select it from an explorer window with the button: once selected, the file is transferred to the server that contains the ACD in one of the campaign's directories.

With the button you can list all audio files on the ACD server, displayed in tree-diagram layout.

The button lets you play the audio file in the corresponding field. Note: heavy files may take some time to be launched.

## « Voice mail » Mode




This mode allows the customer to leave a voice mail which can be found in the "Incoming media" menu / Voice mail messages

**"Input message"**: indicates the audio file asking the customer to leave a message.

**"Check message"**: this message is used to repeat the caller's voice mail for validation. It is automatically followed by a repetition of the caller's message.

**"Confirm message"**: tells the customer which key to use to go back to the previous step to enter the voice mail (in case of error).

**"Bye message"**: the last message confirming the customer that his voice mail was successfully registered and will soon be treated.

For each field it is possible to directly enter the file path and name, or to select it from an explorer window with the button: once selected, the file is transferred to the server that contains the ACD in one of the campaign's directories.

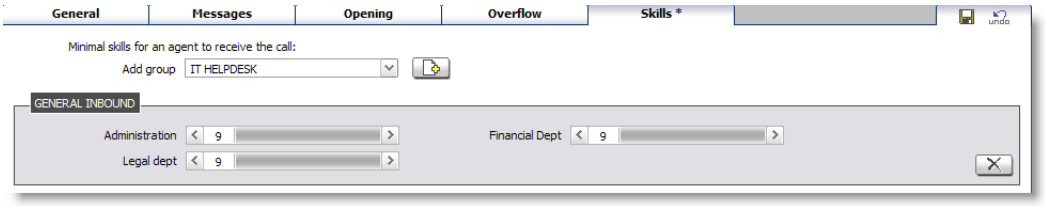
With the button you can list all audio files on the ACD server, displayed in tree-diagram layout.

The button lets you play the audio file in the corresponding field. Note: heavy files may take some time to be launched.

## SKILLS tab

This tab is used to define the profile settings or the profile level an agent must have in order to receive calls on that campaign. Calls coming on that campaign will automatically receive the profile defined here.

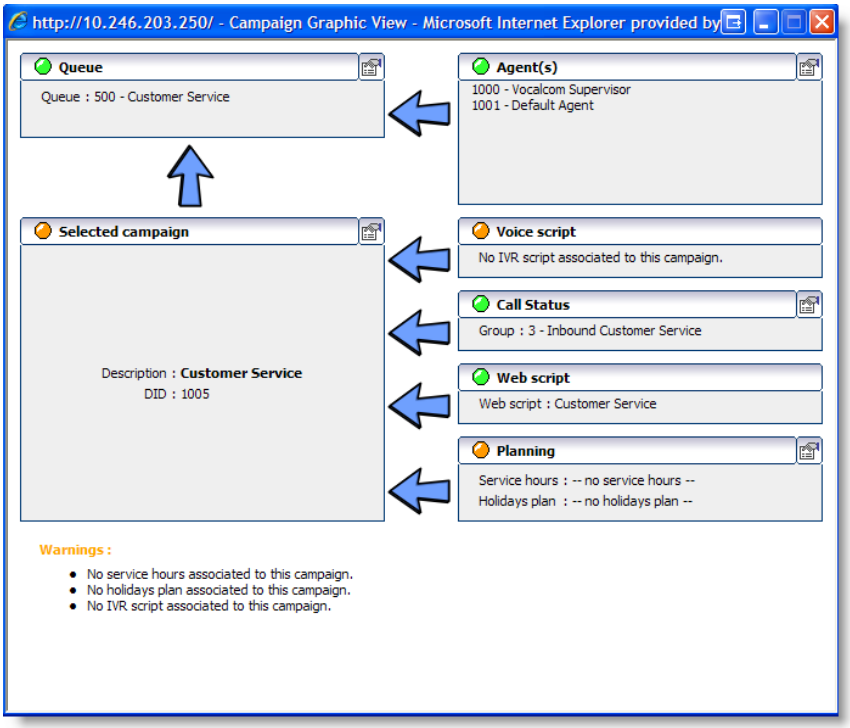
Each cursor indicates the level of a specific profile. See section « Human Resources\Agent skills» on page 66**Erreur ! Signet non défini.** to define a Skill group.




## Campaign Graphic View

This window is used to run a diagnostic on the selected campaign and to get a graphical view of the components that may have to be amended or added before the campaign can be

started. The elements of the campaign are presented and regrouped in the following frames: **Agent(s)**, **Queue**, **Voice Script**, **Call Status**, **Web Script** and **Planning**.


http://10.246.203.250/ - Campaign Graphic View - Microsoft Internet Explorer provided by
Queue
Queue : 500 - Customer Service
Agent(s)
1000 - Vocalcom Supervisor
1001 - Default Agent
Selected campaign
Description : Customer Service
DID : 1005
Voice script
No IVR script associated to this campaign.
Call Status
Group : 3 - Inbound Customer Service
Web script
Web script : Customer Service
Planning
Service hours : -- no service hours --
Holidays plan : -- no holidays plan --
Warnings :
No service hours associated to this campaign.
No holidays plan associated to this campaign.
No IVR script associated to this campaign.

In the title bar of each frame, a symbol indicates the status of the diagnostic:

a green light means that the elements are correctly configured.

an orange light means that warning messages have been detected with regard to the elements. The campaign can be launched, but it will not function perfectly.

a red light means that warning messages have been detected with regard to the elements. The campaign cannot be launched.

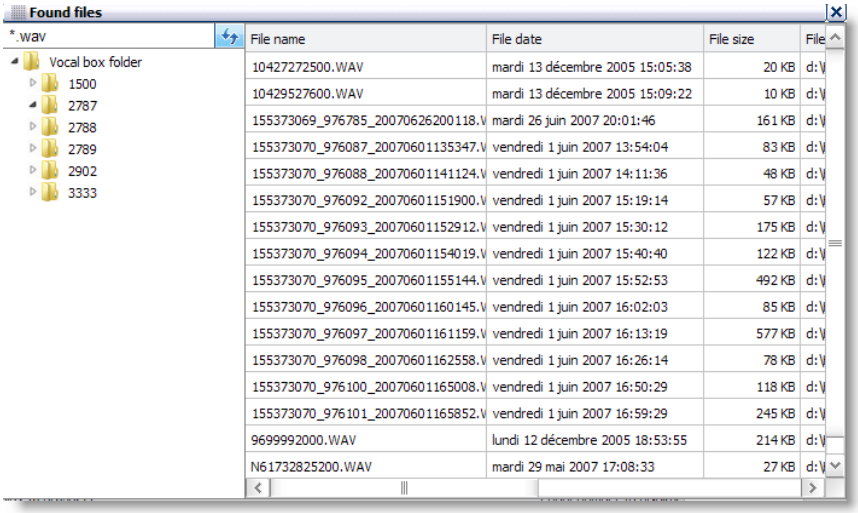
By clicking on the button in the corner of a frame, you can directly access the configuration window of the elements from the frame in question.

At the bottom of the screen, the list of **Errors** and **Warnings** is shown.
A campaign for which warnings have been detected can be launched, but not all of its functions will work properly.

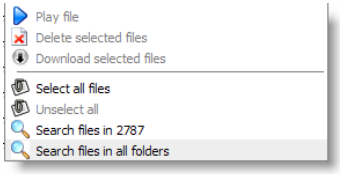
If you leave the Campaign Graphic View open, the changes executed on the campaign that is being diagnosed, are directly analyzed and reflected in the graphic view in real time.

## Voice mail messages

This window shows all the voice mails files found on the server and allows deleting it or listening it using the buttons and .



Left click on the file to open the options menu:

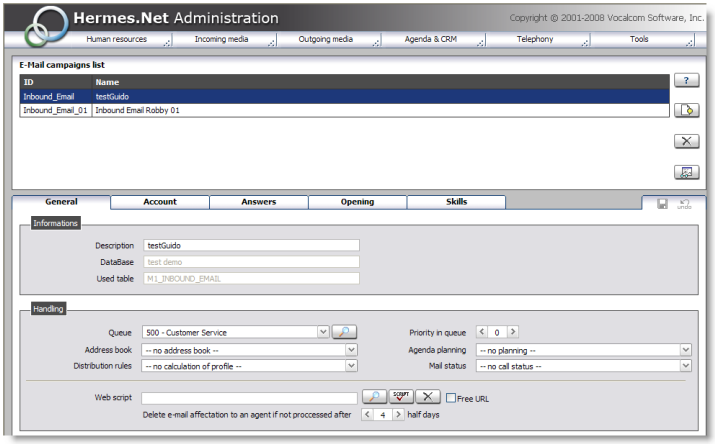



The following options are available: Play file, Delete selected files, Download selected files, Select all files, Unselect all, Search files in campaign folder or in all folders.

## Incoming E-Mail campaigns

## Campaigns configuration

This window shows the list of inbound e-mail campaigns defined on the system. The upper right list shows all campaigns defined for the site.



The different option tabs allow you to access the following information:

**General**: to change the global configuration of the selected campaign (description, queue, database information and web script)

**Account**: to enter information of the mail account used.

**Answers**: to specify the predefined answers

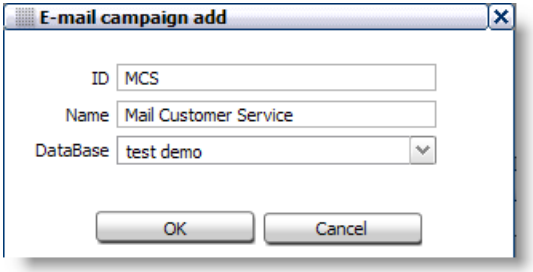
**Opening**: to specify opening days and hours of the campaign.

**Skills**: to define the profile settings of mails for that campaign.

The **ID** column contains a name that describes the campaign.

Use the and buttons on the right hand side of the upper list, to add or delete campaigns.

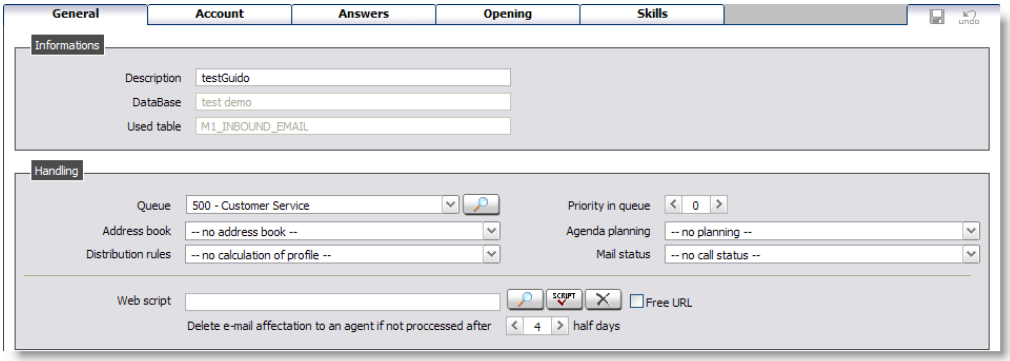
A new campaign is created using the next dialog box:




A short and long name of the campaign must be typed in.

You have to select a connection name in the list **Database** and a new table will be created into this database, with a name based on the campaign name. This table will be used to store the content of the campaign mails.

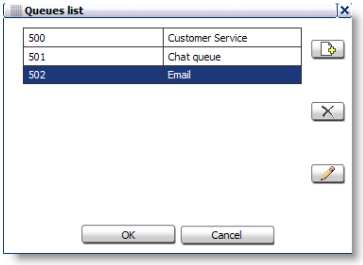
## General tab




**Description**: long name of the campaign. By default, the short name is indicated, and it can be changed here.

**Database, Used tabel**: This information recalls the database and the table where the mails are physically stored. This database has been chosen during the campaign creation and cannot be modified anymore. The mails table name is based on the short campaign name.

**Queue:** shows the waiting queues defined on the system; it allows choosing the queue towards which the e-mails of this campaign will be re-directed by default.




The button can be used to open a queues management pop-up. Buttons and can be used to add or remove queues. The button allows editing the selected queue details.

**Priority in queue**: allows giving a priority to the mails received on this campaign compared to other campaigns. The higher the value the more the priority the call will get.

**Address book**: is used to link an “Address book” created in the “Agenda & CRM” menu of the administration module (explained later in this documentation). This address book will be visible by the agent when creating a new appointment using the “Agenda” interface integrated in a page of the script used on this campaign.

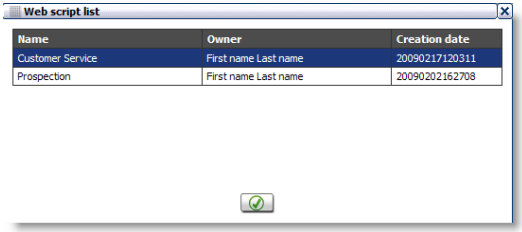
**Agenda planning:** used to define an “Agenda” to the campaign. The agenda is created using the Agenda option of the “Agenda & CRM” menu (explained later in this documentation).

**Distribution rules**: this field allows selecting a profile answer to the received email.

**Mail status**: shows the email qualifications defined on that campaign; it lets you select a email status group for each email campaign.

**Web script:** to indicate the path to a web script displayed during mail handling.

With the button you can open a dialog window with the list of available scripts.




Select first the platform to scan and afterwards select the script into the list. Click on .

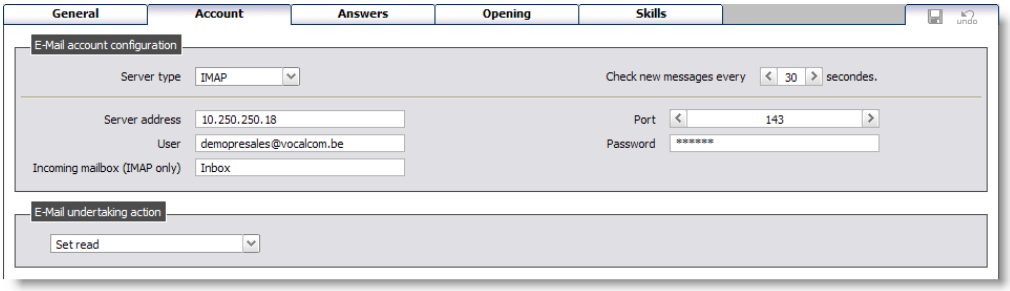
The

button can be used to execute the script. The button can be used to cancel and remove the script name.

**Delete mail affectation to an agent if not processed after**: this value allows giving the maximum delay, in half days, during which the email is kept in an agent inbox. After this delay the system will forward the not processed email into the inbox of an available agent.

## Account Tab

This tab is used to set mails server login information.




**Server type**: allows choosing the server type between IMAP, POP, Database and Plugin.

**Check new message every x seconds**: allow to specify the time interval between 2 new incoming verifications.

The 2 first server types are used to connect directly mails servers, and the 2 last are completely different (**Database**: connection to a database to extract mails from a table, or **Plugin** : complex database access via a customized module).

**Server address**: name of the mails server

**Port**: port used to connect the server (143 for IMAP, 110 for POP)

**User/Password**: indicate here the mail account login and password

**Incoming mailbox (IMAP only)**: indicate here the name of the inbox used ("INBOX" by default for Exchange servers).

**Mail undertaking action**: indicate which action will be done on new mails when they are handled by the system: set as read, deleted or moved to another folder (a new box appears to type the name of this folder).

The **Database** mode used to get mails uses the next parameters:

**Mail database connection string**: location of the database (udl format)

**Source table (or request)**: name of the table containing mails records or complete query used to get the next mail.

**Indice**: name of the column used as unique identifier of mail

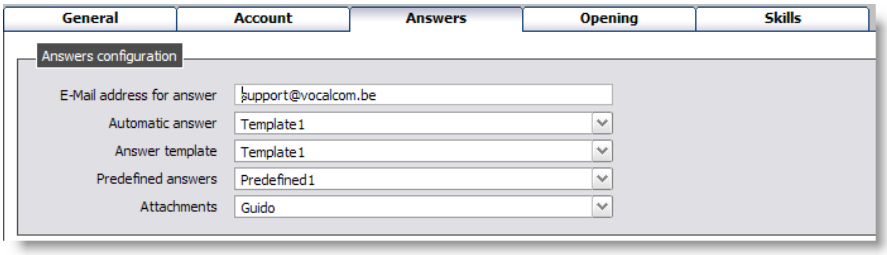
**'Read' field (or update request)**: name of the column to be updated when a record (mail) is treated or complete update query to be executed to notify record as 'treated'.
**Conversion template**: text file used to map database columns to mails fields

The **Plugin** mode uses the parameter **Plugin** to identify the specific module used to get mails.

Once the campaign is created and the parameters are correctly set, the Mail service starts scanning the indicated server and extracts mails to put it into the mails table, based on the indicated time interval.

## Answers Tab

This tab is used to set all the templates used by the campaign.




**Email address for answer**: address used for the answer mails. Don't forget to fill this field; else the Mail Agent interface will give an error when the agent tries to send an answer.
**Automatic answer**: specify the template used to build automatic answer to received mails.
**Answer template**: this list allows selecting an answer template that will be automatically set to the mail answer. This formatted answer can be modified by the agent before sending.

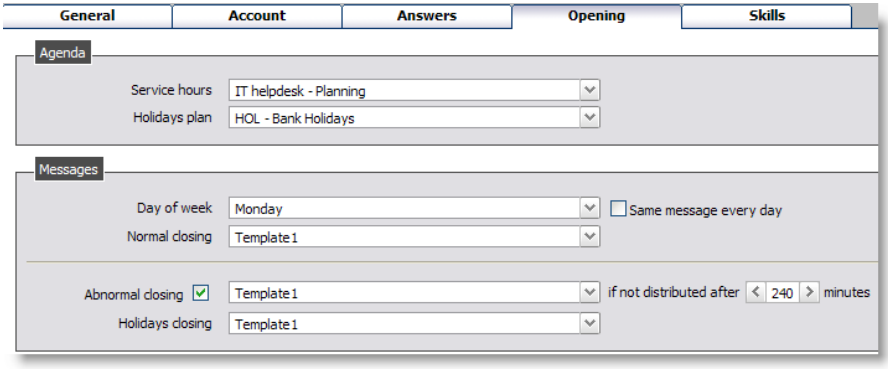
**Predefined answers**: this list proposes sets of answers defined on the screen "Predefined Answers", as described in the section Predefined answers"Predefined answers". This field

allows selecting a set of predefined sentences that will be available to the agent to complete an answer mail.

**Attachments**: this list proposes sets of documents defined on the screen “Attachments” as described in the section “Attachments” on page. These documents are proposed to the agents to link to the mails answers.

## Opening Tab

The time schedule that applies to the campaign in question is chosen here, as well as the answer templates to be sent when a mail arrives during closing time. You can also define the abnormal closing answer here.




**Service hours**: to select the opening times that applies to this campaign. This schedule is defined in the window of the planning configuration, as described in section “Service Hours”

**Holidays plan**: to define the closing time schedule. See section “Holiday Plan” for more information.

**Day of week**: to select for each week days a specific template to be used to answer during closing hours. If the box "**Same message every day"** is checked, the template is the same for all days of the week. This option is defined by default. When unchecked, another template can be selected from the field « Normal closing », for all different days.

**Normal closing**: the template to be used to build sent answer when the call center is closed according to the normal opening and closing times of the service.

**Abnormal closing**: the template to be used during closing time not defined as normal closing time, but because the agent that should take the mail is unable to do so. This message is considered as an emergency answer, for instance when agents are unable to log in due to a technical problem. Check the box to disable this option.

**If not distributed after … minutes**: specify here the delay the system waits before considering we are in abnormal closing.

**Holidays closing**: specify the template used to build answers messages during holidays.

## Automatic Messages principle

The default rules are:

- If the mail arrives during holidays and a template **Holidays Closing** is defined
  -> Message: **Holidays Closing** is sent by the system

- Else, if the mail arrives after service hours and a template **Normal Closing** is defined
  -> Message: **Normal Closing** is sent by the system

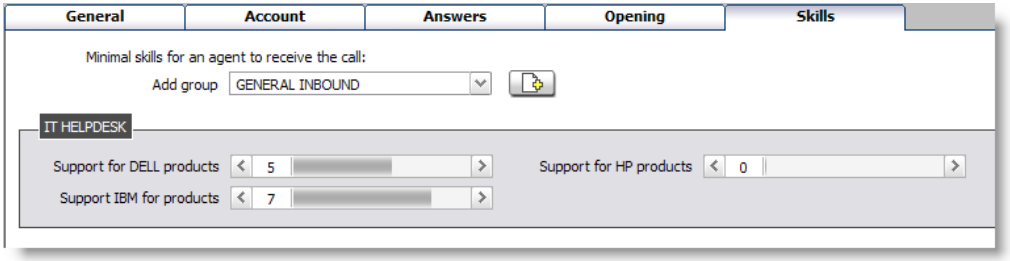
- Else
  - if a template **Automatic answer** is defined

-> Message: **Automatic answer** is sent by the system

- if the mail is waiting to be treated by an agent since n minutes, then
  - if it's during holidays and a template **Holidays Closing** is defined
    -> Message: **Holidays Closing** is sent by the system
  - else, if it's after the service hours and a template **Normal Closing** is defined
    -> Message: **Normal Closing** is sent by the system
  - else, if a template **Abnormal Closing** is defined
    -> Message: **Abnormal Closing** is sent by the system

### Skills Tab

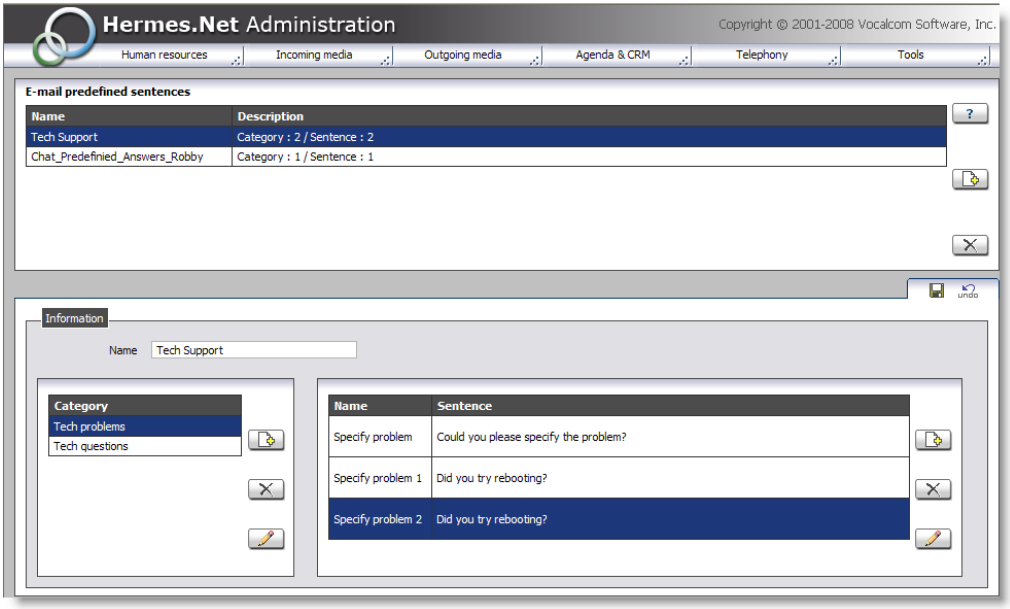
Window to define the profile settings, meaning the level of minimum competences an agent must have to receive an e-mail.
Each cursor indicates the level of a specific skill. See section "Profiles" for defining profiles.




## Predefined answers

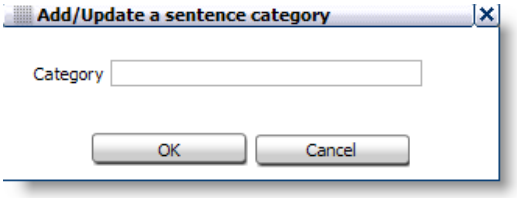
This screen is used to define sentences that will be shown on the Agent Mail interface. Sentences are grouped into category, and categories are grouped into set. The set is afterwards assigned to the campaign.

Predefined answers significantly shorten response time as agents do not have to manually type information. Furthermore, this enhances consistency and prevents typing errors.
The list on the upper right side shows all the created sets.

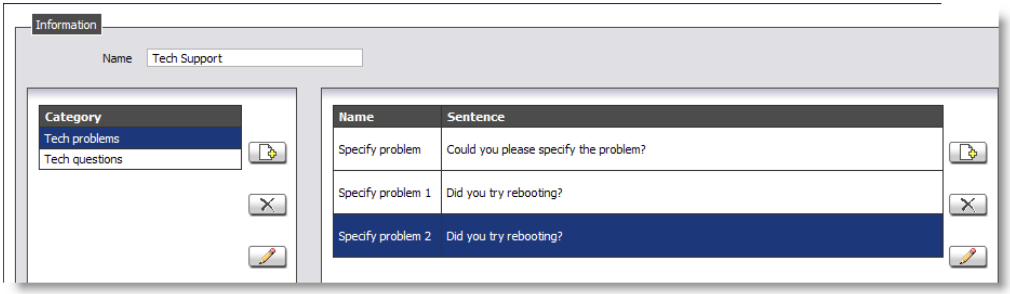



With the and buttons on the right side of the list, you can add or delete a group.

A new set is created using the next dialog box:




Once created, sentences can be added into the set using the second part of the screen.

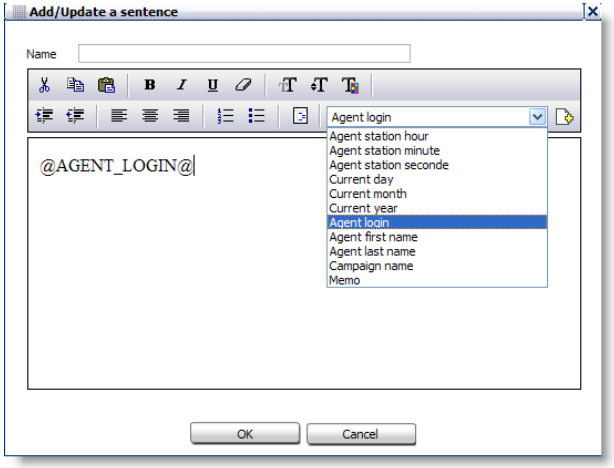



On the left side, the categories existing into the current set are displayed. Use the buttons and on the right side of this list to add or delete category.

On the right side, the sentences created into the selected category are displayed.

Use the buttons on the right side of the list to add a new sentence.

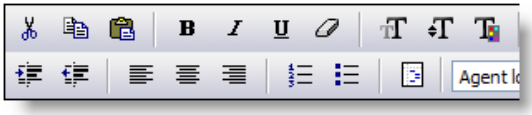
The next dialog box appears:



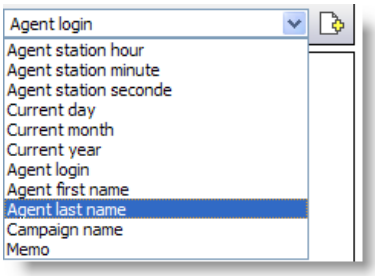

**Name**: the name of the sentence.

**Sentence**: the content that will be displayed to the agent.

Use the following options, shown underneath, to format your text:



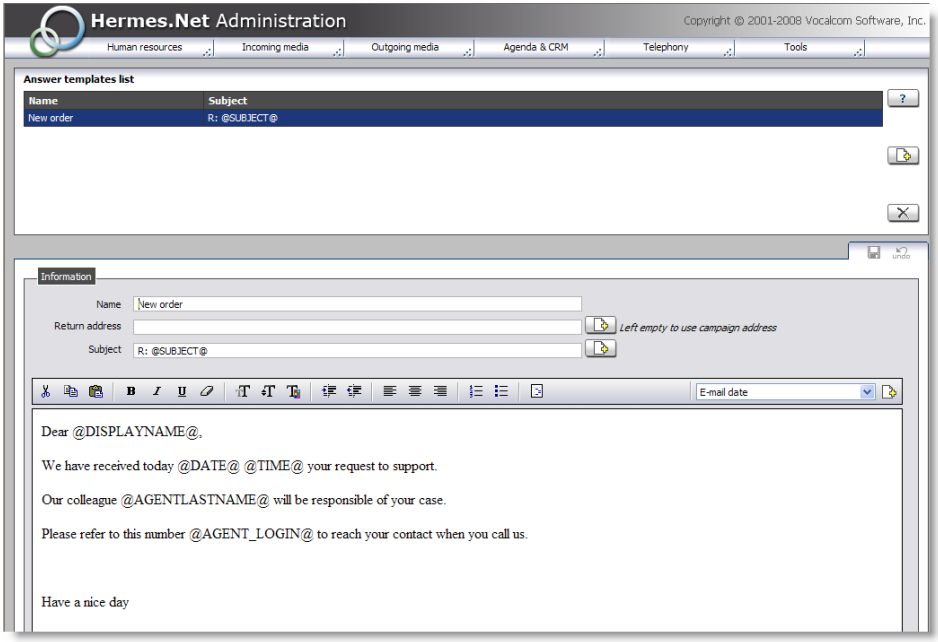
**System variables**: these variables are designed to search the value selected and display the data in the “predefined sentence”.



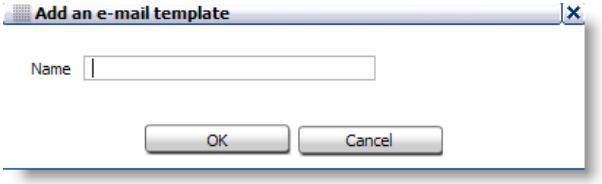

Use the button to edit an existing sentence or the button to remove it.

# E-mail templates

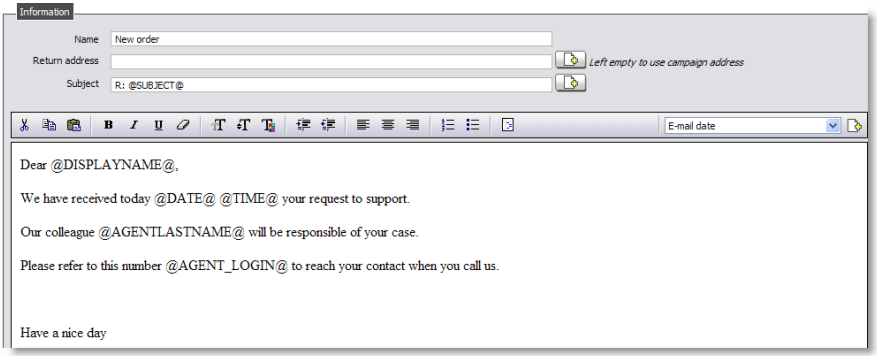
This screen is used to design automatic email answers that will be sent to the recipient in case of normal/abnormal closing, during holidays, or for every inbound mail.
Example: the automatic answer named “Answer template” will be used to reply every inbound mail and ensure customer that his request will be treated shortly.




With the and buttons on the right side of the upper list, you can add or delete a template.
A new template is created using the next dialog box :



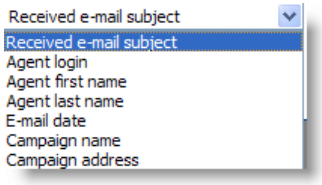

Once created, the content can be completed using the second part of the screen.


Information
Name
New order
Return address
Left empty to use campaign address
Subject
R: @SUBJECT@
E-mail date
Dear @DISPLAYNAME@,
We have received today @DATE@ @TIME@ your request to support.
Our colleague @AGENTLASTNAME@ will be responsible of your case.
Please refer to this number @AGENT_LOGIN@ to reach your contact when you call us.
Have a nice day

The **name** and the **subject** can be adapted.

"**Return Address**" field allows choosing the email address shown as "sender". If this field is left empty, the email address configured on the campaign\account tab will be displayed to the recipient.

The use of variables is allowed by pressing the button, the following window appears:



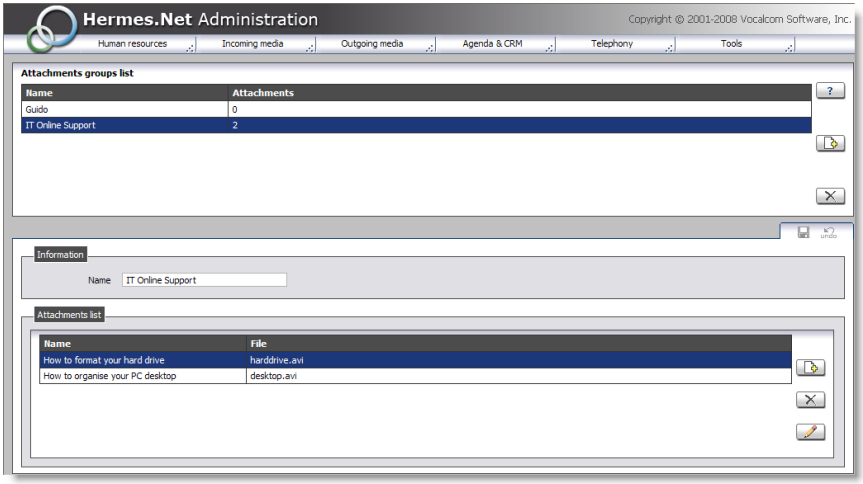

The main zone is a text edition window with a toolbar. This toolbar allows using the next functions:

**cut, copy and paste text, set text format to bold, italic, underline, or clear formatting, select the font, the size and the colour of the text, increase or decrease indent, align left, center or right, apply numbering or bullets.**

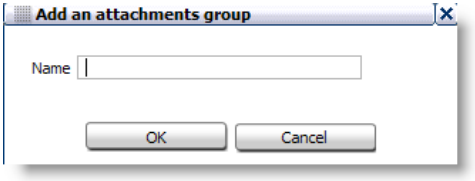
The last button can be used to switch from HTML mode to text mode. The text mode doesn't use any text formatting, so the toolbar described here above is not longer applicable and disappears. A warning message informs you first that converting to plain text will lose formatting information.

## Attachments

This screen is used to define sets of documents that will be shown on the Agent Mail interface to be used as reply. The list on the upper right side shows all the created sets.

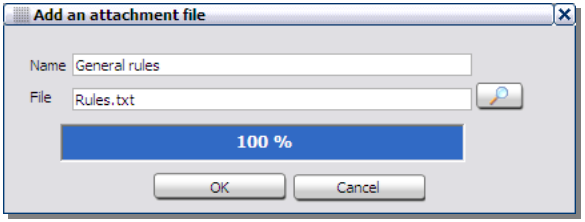



With the and buttons on the right side of the list, you can add or delete a set.
A new set is created via the next dialog box:




Once created, documents can be added into the set using the second part of the screen. They are shown in the second list.

Use the buttons and on the right side of this list to add or delete documents. When a new document is added, the application allows selecting the local file into a browser dialog box. Enter a attachment name, a progression bar appears during the upload.

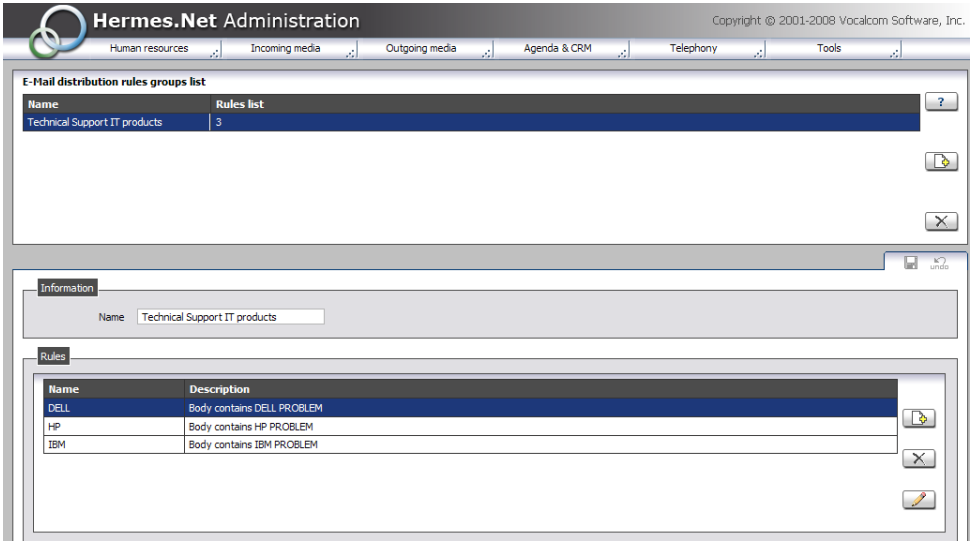



Use the button to edit the name of an existing document.

## Distribution rules

This screen is used to define filters to be applied on received mails. According to these filters, a specific profile will be affected to an incoming mail.

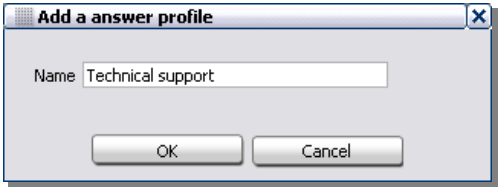
In the example below: a filter « Technical support » is created. There's "1 rule" named "HP" which applies when the Body of the incoming mail contains the word « problem ». Mails applying this condition will be set with the max HP profile. (We suppose that mails matching to this condition are in French and thus can be directly sent to a French agents group).

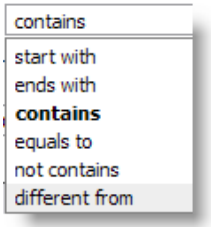



The list on the right side shows all the profiles.

With the and buttons on the right side of the upper list, you can add or delete profiles.

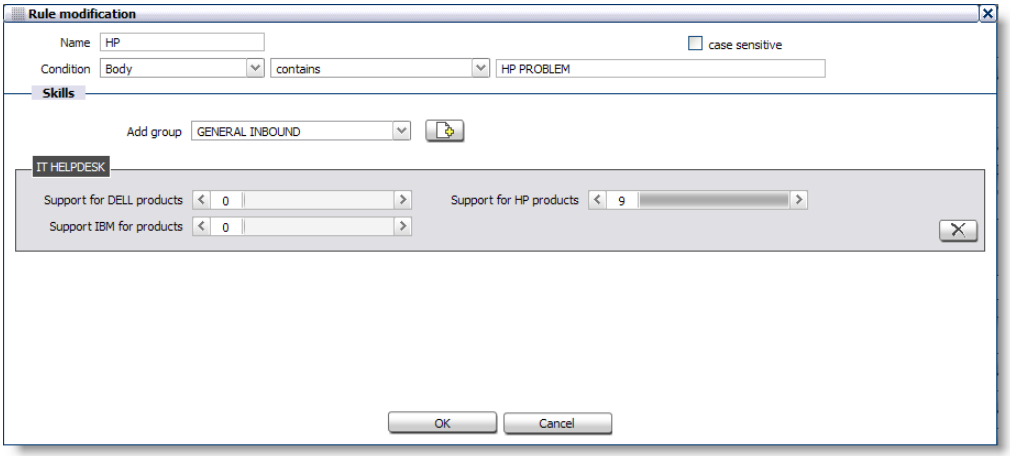
A new profile is created using the next dialog box:



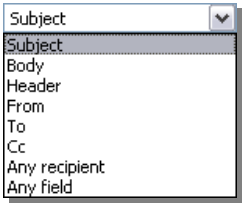




Once created, rules can be added to the profile using the second part of the screen.

Use the buttons on the right side of the list to add a new filter. The next dialog box appears:




The upper part of this window allows defining the condition of the filter:




**Name**: the name of the rule.

**Case sensitive**: check this box to indicates that text filter must be case sensitive

**Condition**: define here which part of the received mail must be filter: the subject, the body, the header, the From/To/Cc fields, the recipient or any field.

Afterwards select the kind of comparison to do:

begin with, end with, contains or equal to.

And type the value to compare in the last field.

The lower part shows all the profiles cursors. Adapt each cursor to compose the profile to be applied to the mails matching to the condition.

Click on

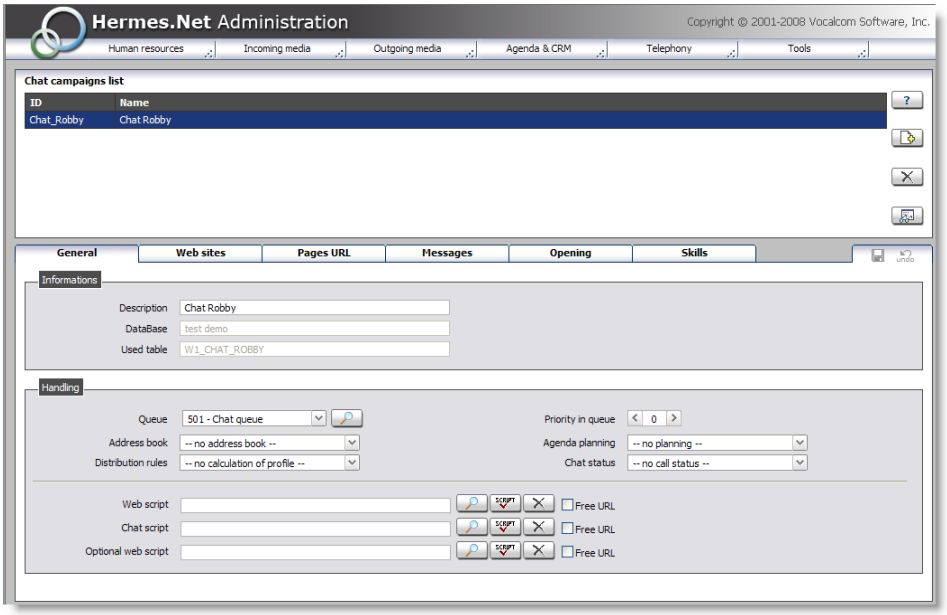
to validate this rule.

An answer profile can be composed of several filter rules.

Use the button to edit an existing rule.

## INBOUND CHAT CAMPAIGNS

This window shows the list of inbound Chat campaigns defined on the system. The upper list shows all campaigns defined for the site.




The different option tabs allow you to access the following information about the campaign:

**General**: to change the global configuration of the selected campaign (description, queue, database information and web script, etc)

**Web sites**: to configure the web sites linked to this campaign

**Pages URL**:

**Messages**: used to select predefined answers, sentences and videos.

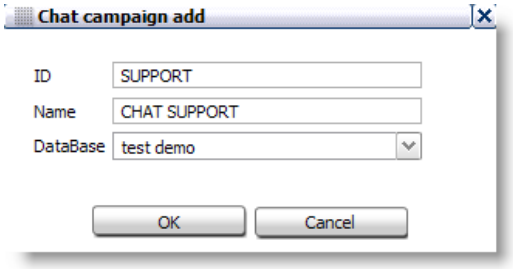
**Opening**: to specify opening hours on the campaign.

**Skills**: to define the profile settings of chat sessions received on that campaign.

The **ID** column contains a **name** that describes the campaign.

Use the and buttons on the right hand side of the upper list, to add or delete campaigns.

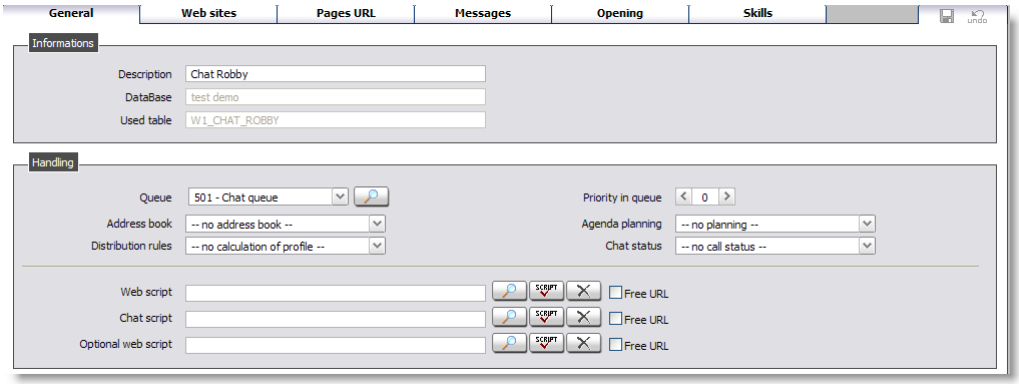
A new campaign is created using the next dialog box:




A short and long name of the campaign must be typed in.

You have to select a connection name in the list **Database** and a new table will be created into this database, with a name based on the campaign name. This table will be used to store the content of the campaign mails.

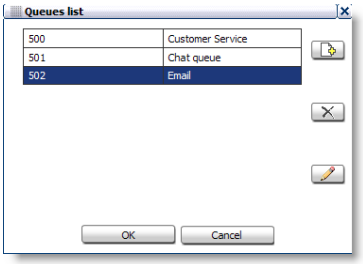
## General tab




**Description**: long name of the campaign. By default, the short name is indicated, and it can be changed here.

**Database, Used table**: This information recalls the database and the table where the mails are physically stored. This database has been chosen during the campaign creation and cannot be modified anymore. The mails table name is based on the short campaign name.

**Queue:** shows the waiting queues defined on the system; it allows choosing the queue towards which the e-mails of this campaign will be re-directed by default.




The button can be used to open a queues management pop-up. Buttons and can be used to add or remove queues. The button allows editing the selected queue details.

**Priority in queue**: allows giving a priority to the chat sessions received on this campaign compared to other campaigns. The higher the value the more the priority the chat will get.

**Address book**: is used to link an “Address book” created in the “Agenda & CRM” menu of the administration module (explained later in this documentation). This address book will be visible by the agent when creating a new appointment using the “Agenda” interface integrated in a page of the script used on this campaign.

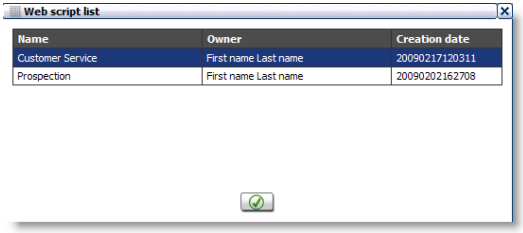
**Agenda planning:** used to define an “Agenda” to the campaign. The agenda is created using the Agenda option of the “Agenda & CRM” menu (explained later in this documentation).

**Distribution rules**: this field allows selecting a profile answer to the received chat session.

**Chat status**: shows the chat qualifications defined on that campaign; it lets you select a chat status group for each email campaign.

**Web script:** used to indicate the path to a web script displayed during mail handling.

With the button you can open a dialog window with the list of available scripts.




Select first the platform to scan and afterwards select the script into the list. Click on .

The

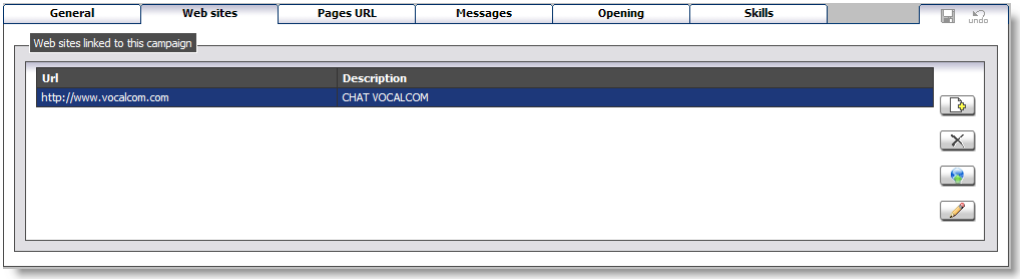
button can be used to execute the script. The button can be used to cancel and remove the script name.

**Chat script**: to indicate the path to a chat script displayed during chat session.

**Optional script**: used to indicate the path to an optional web script displayed during chat handling.

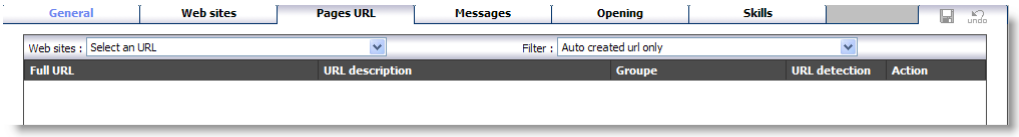
## Web Sites

This tab is used to define the web sites using chat.



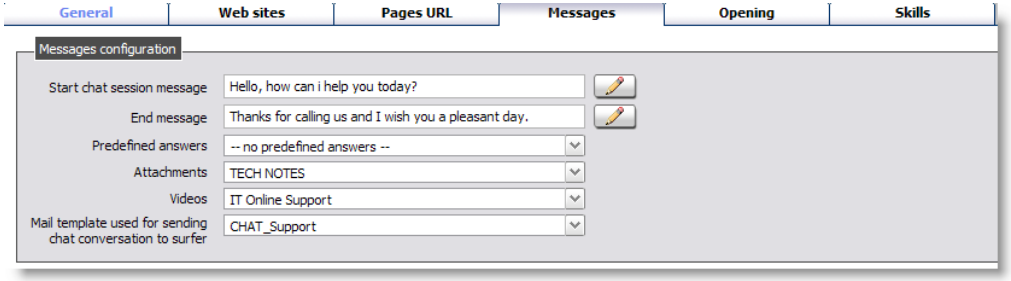

Buttons and are used to add or remove web sites. You'll need to type in the web site url and a description. Use the button to "Publish" the url.

## Pages URL




## Messages

This tab is used to set all the templates used by the campaign.




**Start chat session message**: message displayed at the beginning of the chat session.

**End message**: message displayed at the end of the chat session.

**Predefined answers**: this list proposes sets of answers defined on the screen “Predefined Answers”, as described in the section Predefined answers“Predefined answers”. This field allows selecting a set of predefined sentences that will be available to the agent to complete an answer mail.

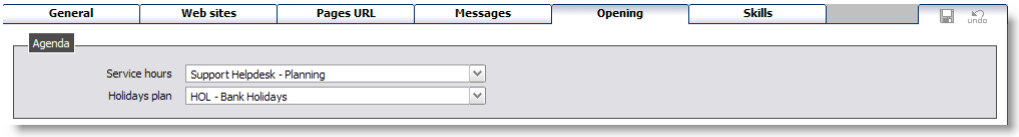
**Attachments**: this list proposes sets of documents defined on the screen “Attachments” as described in the section “Incoming chat/Attachments”. These documents are available during the chat session.

**Videos**: allows selecting videos that can be played during the chat session.

**Mail template used for sending chat conversations to surfer:**

## Opening Tab

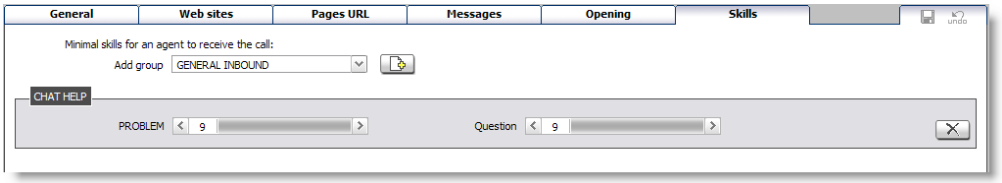
The time schedule that applies to the campaign in question is chosen here, as well as the answer templates to be sent when a mail arrives during closing time. You can also define the abnormal closing answer here.




**Service hours**: to select the opening times that applies to this campaign. This schedule is defined in the window of the planning configuration, as described in section “Service Hours”
**Holidays plan**: to define the closing time schedule. See section “Holiday Plan” for more information.

## Skills Tab

This tab is used to define the profile settings of the chat sessions entering this campaign. The level of this profile represents the minimum level of profile required by an agent in order to receive a chat session of this campaign.
Each cursor indicates the level of a specific skill. See section “Profiles” for defining profiles.



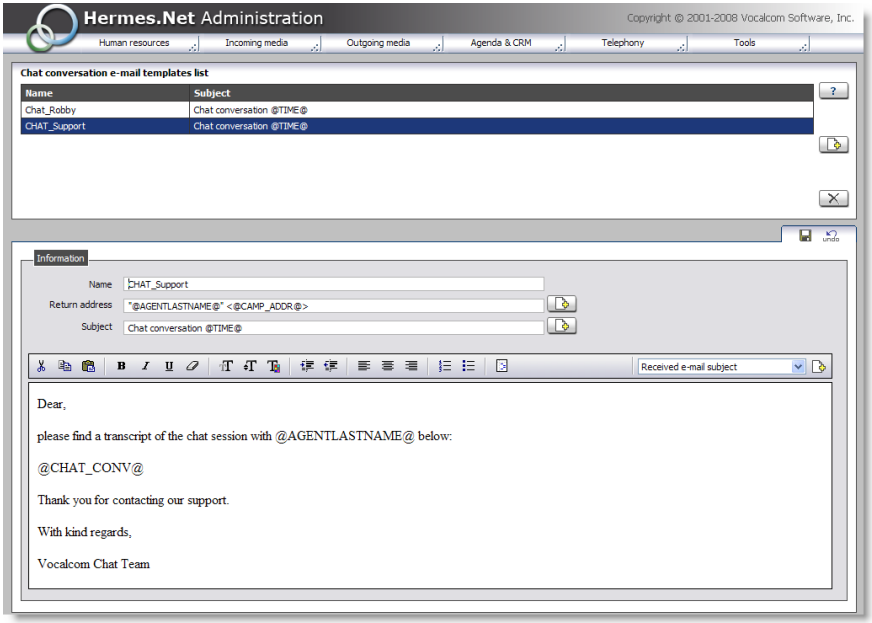
## Predefined answers

Menu not working (bug) → Dev

## Chat templates

Chat templates are designed to help the agent during the chat session.

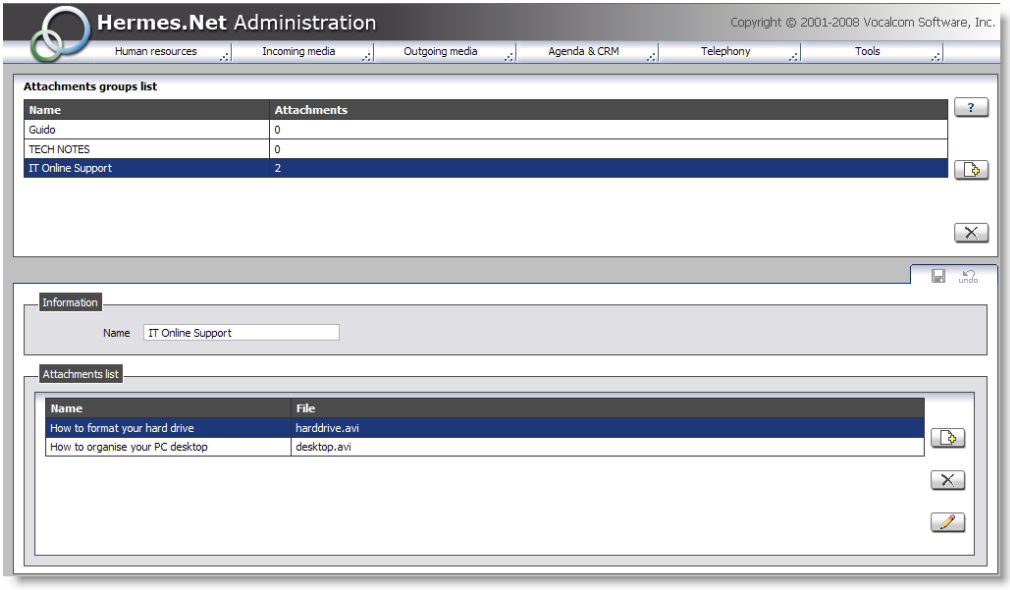
Chat templates are created the same way as “email templates” please see on page 111 for more information on how to create templates.



## Attachments

Attachments (documents) can be sent during chat sessions.

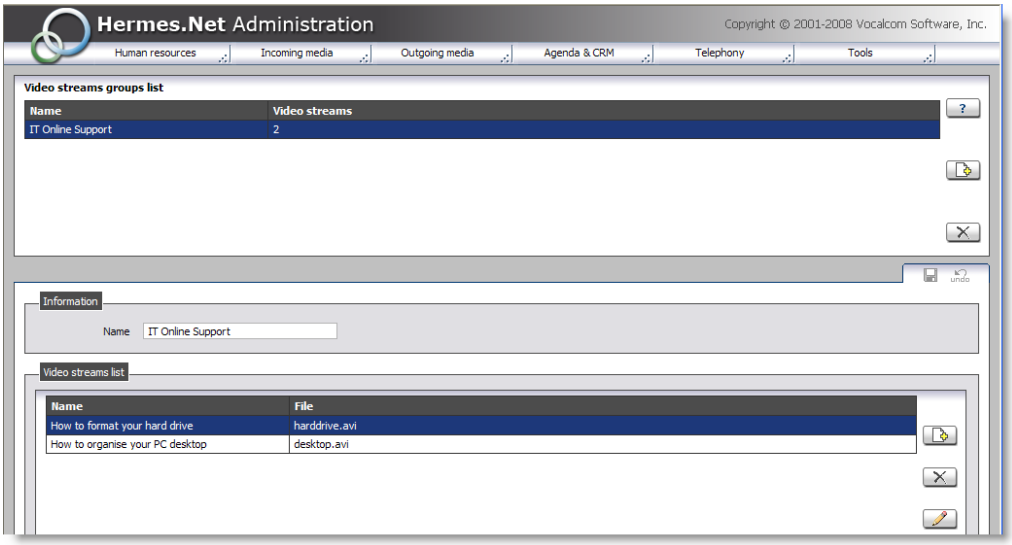
The attachments screen is the same as “Incoming mail/Attachments” screen please see page 113 for more information on how to upload attachments.




## Video Streams

Video streams are uploaded here in order to be sent by the agent during a chat session.

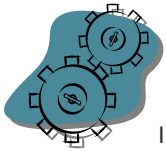
Video streams are uploaded the same way as “**Attachments**”, please refer to page 113 for more information on how to upload video files.




## Chat Distribution rules

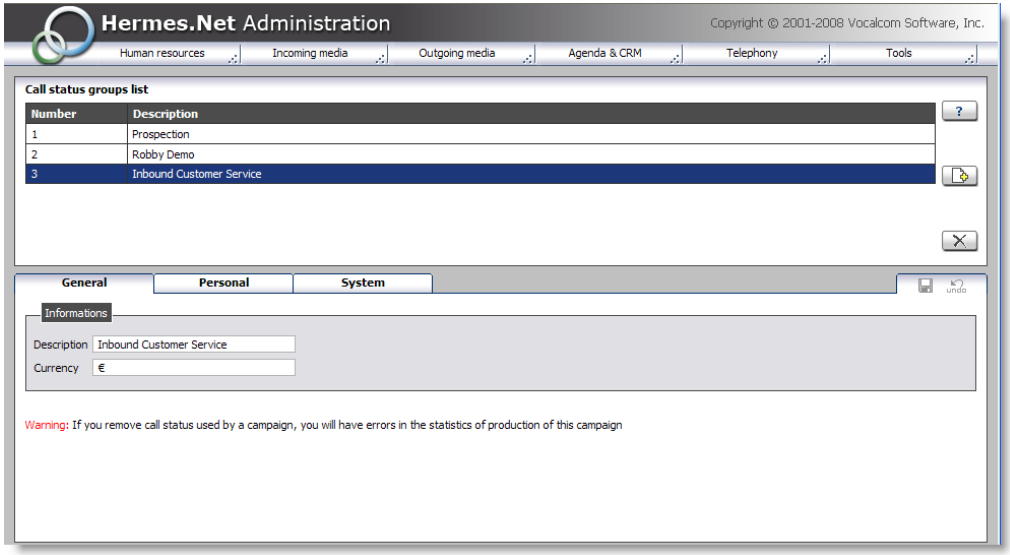
Chat profiles are designed to give a profile to an incoming chat session. Once the chat has received a profile, the system will look for an agent having the required profile and connect the contact with the agent. Chat profiles are created the same way as “**Email distribution rules**”; please refer to page 108 for more information on how to configure “Chat profiles”.

## CALL STATUS

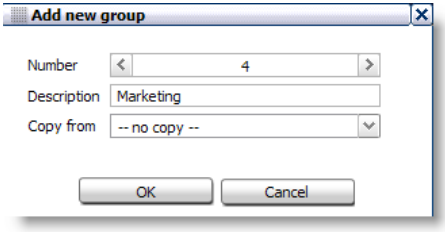


In this chapter you will learn how to generate call status (call qualifications) and pause codes to be used in campaigns.

When used by agents during call handling, these call statuses are registered in the database server and will be displayed in real-time supervision as well as historical reporting. Reporting and Supervision are separated modules which are explained in other module documentation.



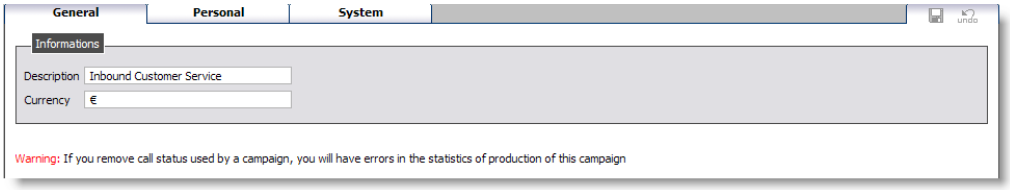

Call status sets can be added or deleted with the and buttons.




**Number**: Each call status set (or group) is identified by a unique number between 0 and 99. The 0 value is reserved for a call status set that can be used in all campaigns.
**Description**: the administrator can enter a brief description of the call status set in this field.

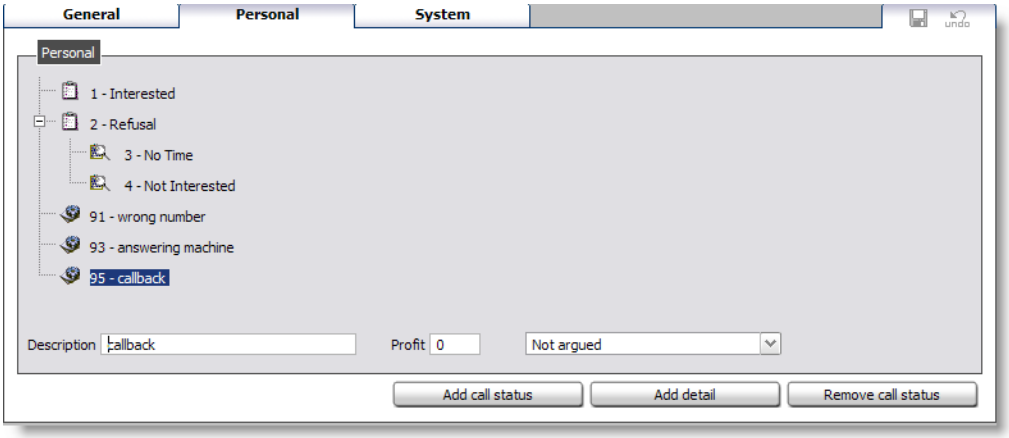
The tabs below the list allow you to configure the call status groups.

- **General tab**




**Description**: the administrator can enter a brief description of the current call status set in this field.
**Currency**: allows assigning a currency that can be used later to do traffic cost estimations.

## Personal tab




The upper part shows the elements the call status set consists of.

Three call qualification types exist:

- standard call status
- standard call status detail (sub category)
- system call status (common to multiple campaigns)

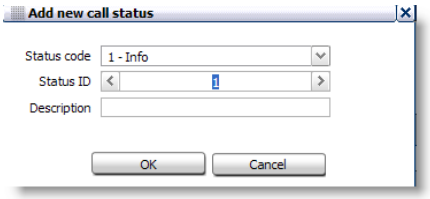
The administrator can hide or display the details of a call status set by clicking on ⊞ or ⊟. For each of the qualifications defined, 3 parameters must be configured:

**Description**: brief description of the call status.

**Profit**: this numeric value can be used later during reporting to estimate benefit or losses.

The next list proposes the values **Not Argued**, **Positive** and **Argued** to indicate if the call outcome is « not argued », « positive » or « argued ».

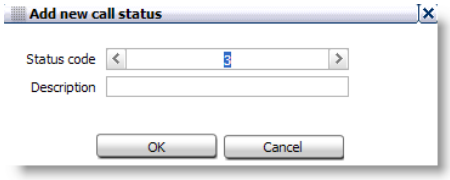
By clicking on Add detail, a window is displayed in which you can add new call status details.




**Status code**: to select to group in which you want to add the detail.
**Status ID**: to give the call status a unique identifier.
**Description**: to enter a brief description of the call status detail.

If you click on the

button, a window appears in which you can add a call status set.




**Status code**: indicates the unique identifier of the new status code.
**Description**: to enter a brief description.
To add system status code, go to the **System** tab.

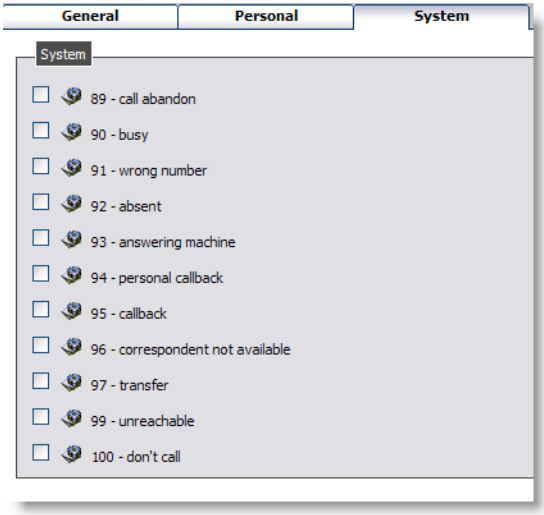
You can delete a call status by clicking on the

button.

- **System tab**

In this tab, the administrator can define which "**system call statuses"** can be used in the current group of call statuses. This tab is usually used for outbound campaigns. These system statuses are used by the dialer when attempting to call phone numbers out of the database which is linked to an active campaign. There's no way of limiting the system of using these

statuses. Selecting them here will give the agents the possibility to use them as well. When using a “Preview dialing” mode (explained later in Outgoing media chapter), the ACD will sent all types of calls to the agents without filtering them. In that case, the agents will need to use them. In other types of dialing modes such as Predictive or Progressive (explained later in Outgoing media chapter),, the ACD will filter all outgoing calls in order to send only the connected calls to the agents.




Simply check the box in front of the call status to display it in the list of the **Personal** tab.

Some of these system qualifications are designed to create a new call attempt:

- Call abandon, Busy, Absent, Answering machine, Personal callback, Global callback, Correspondent not available, Transfer

The maximum amount of call attempts is configured on the outgoing campaign configuration menu.

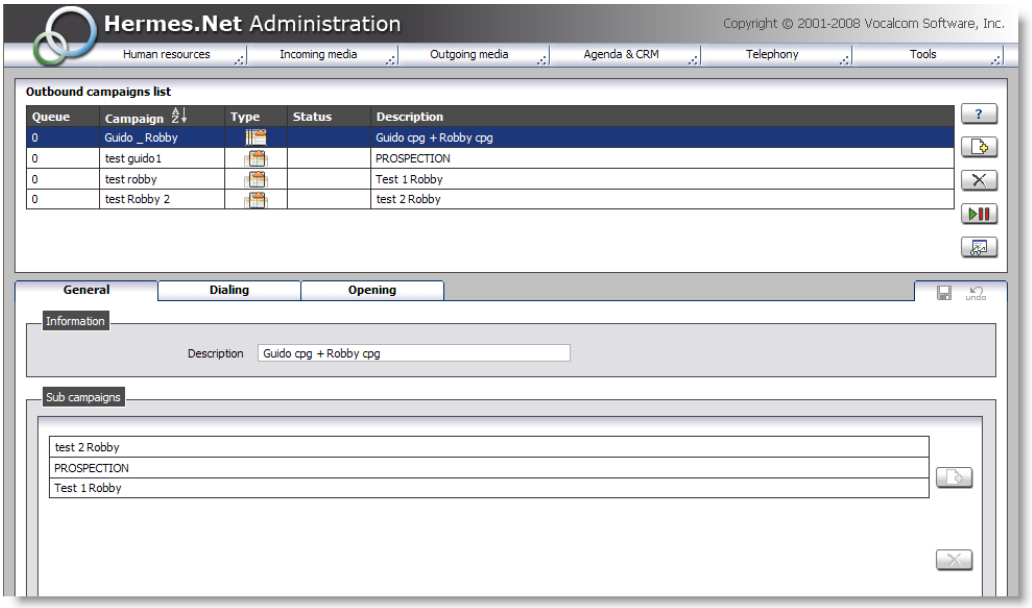
Other system qualifications don’t generate a call attempt:

- Wrong number, Unreachable, Don’t call

# OUTGOING MEDIA

## Campaigns configuration

This window displays the list of outbound campaigns defined on the system.
The **Queue** column indicates the system queue assigned to the campaign. This value is 0 if the campaign is inactive, and is equal to the number of the queue if the campaign is active. This value can be useful in IVR script. The **Campaign** column contains the campaign's short name. The **Type** column indicates if the campaign is **Single** or part of a **group of** outbound campaigns called "**Virtual campaigns"**. The **Status** column indicates if the campaign is active or not. The **Description** column contains the campaign's long name.

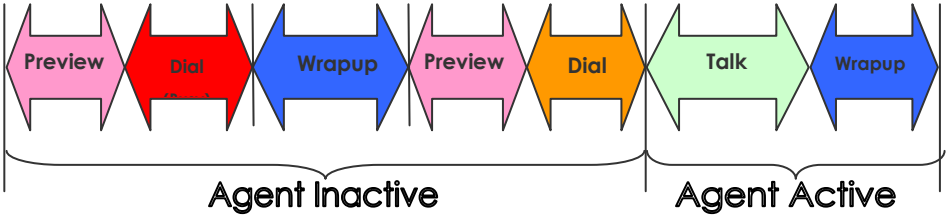


The and buttons on the right can be used to add or delete campaigns.

### 8.2.1 OUTBOUND DIALING MODES

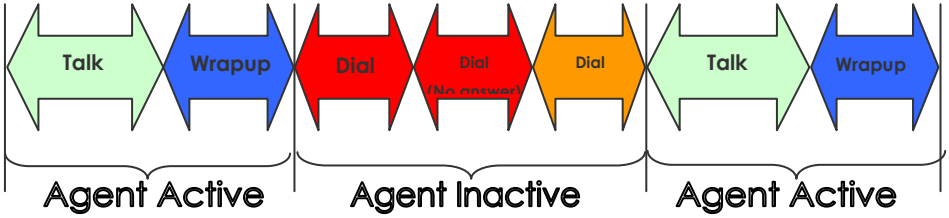
- **Preview**

In this dialing mode the agent first gets a “preview” of the call on his screen. After having familiarized himself with the information, it is the agent who launches the call.




- **Progressive**

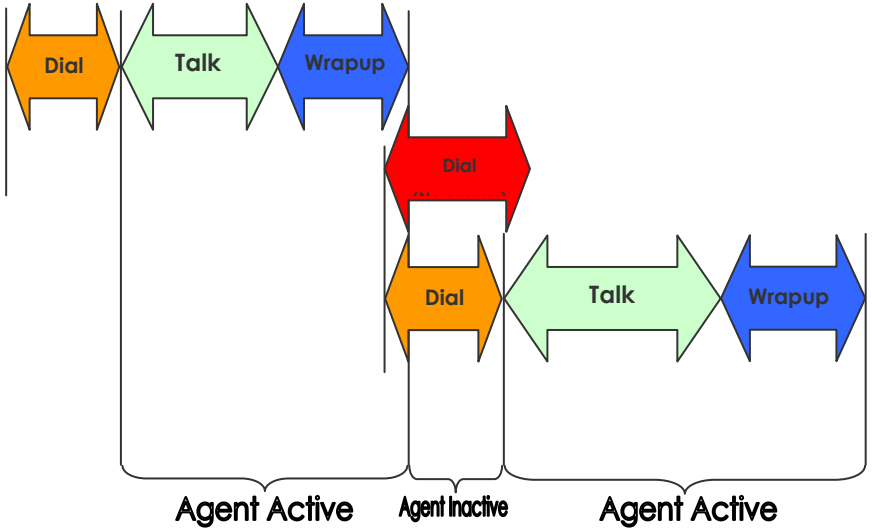
The system is doing one call at a time as soon as the agent puts himself in ready status. Unproductive calls such as no answer, wrong number, fax number, etc., are not transferred to an agent.



## Predictive

Similar to progressive dialing, but based on a more complex algorithm that anticipates when an agent can actually take the next call. The algorithm takes into account elements such as the rate of productive calls, the average call duration… Unproductive calls are obviously not transferred to the agents.

The parameter **% Retention** and **Average wait between 2 calls** enables the administrator to influence the dialing algorithm.



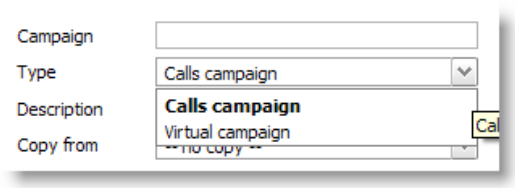

## Predictive without agent

This alternative of the predictive mode allows automating calls which do not require agent intervention. It can be used, for example, to play an audio message distributing announcements or ads, to make recalls conference participants, to execute surveys, and so on.

In the preceding diagram, time devoted to conversation between agent and customer is replaced by the diffusion of an audio message or a script. The only parameter limiting the number of simultaneous calls is a maximum of lines quantity to be used by the system.

### 8.2.2 SINGLE OUTBOUND CAMPAIGN (CALLS CAMPAIGN)

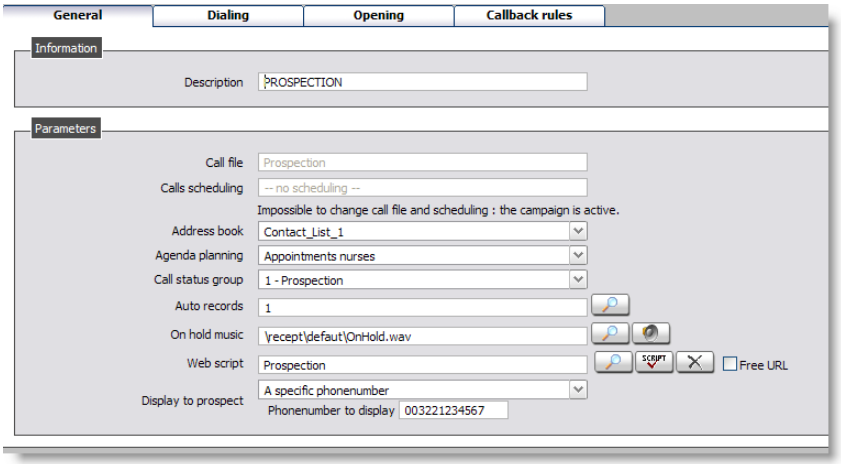
When creating a new campaign, you'll be given the choice to choose between creating a single campaign (**Calls campaign**) or a group of outbound campaigns (**Virtual campaign**).




Make sure to choose "Calls campaign" for creating a single outbound campaign.
Once created the different options tabs provide access to the following information:
**General**: used to modify the global configuration of the selected campaign (description, call file, screen script…)
**Dialing**: used to define the dialing mode, the operator and other parameters.
**Opening**: used to define the service opening hours.
**Callback rules**: allows changing the callback rules used by the system

## General tab

In this tab you can configure the campaign's general parameters.




**Description**: name to the outbound campaign.

**Call file**: indicates the call file to use (contains all information on customers to be called during a campaign). The file must first be created through the **Call file** screen, then assigned to the active campaign with the field **Affected campaign**. (See section «Call File » on page).

**Calls scheduling**: allows selecting a tasks scheduler that will be applied during the campaign. These tasks are defined on the screen "Planning List" described in the section "**Erreur ! Source du renvoi introuvable.**.

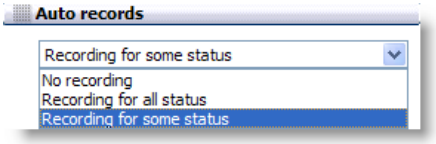
Remark: these 2 last parameters cannot be changed when the campaign is active.

**Address book**: is used to link an "Address book" created in the "Agenda & CRM" menu of the administration module (explained later in this documentation). This address book will be visible by the agent when creating a new appointment.

**Agenda planning:** used to define an "Agenda" to the campaign. The agenda is created using the Agenda option of the "Agenda & CRM" menu (explained later in this documentation).

**Call status group**: allows the administrator to define a call status set by default for this campaign. Information on qualifications can be found in chapter « **Erreur ! Source du renvoi introuvable.** » on page126.

**Auto Recording:** this option allows you to automatically record the conversations received on this campaign. Press the button and the following screen will appear:




Here you can choose to record all calls or you can also choose only certain call statuses for recording.

**On hold music**: the message or music to be played while a call is waiting in the queue.

**Web Script:** to indicate the path to the web script shown during call handling. The

button can be used to test the script.

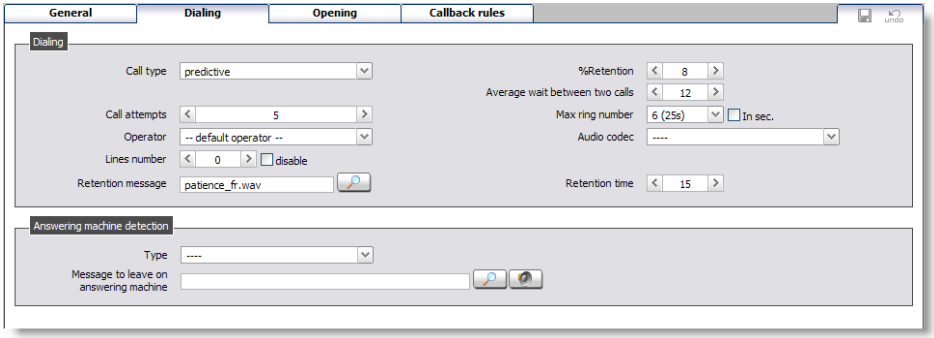
**Display to prospect**: this parameter allows selecting the phone number displayed on the called customer phone. Select:

**The real phone number**
**A specific phone number**
**A hidden phone number**
**Display called phone number (his own phone number)**

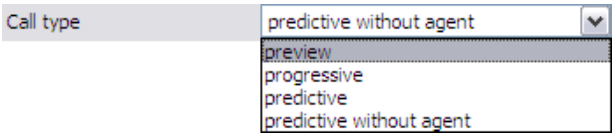
In case you select a specific phone number, a new field **Phone number to display** appears and allows typing the phone number to display.

## Dialing tab

This tab lets you define and configure the dialing mode for the campaign.




**Call type**: this list shows the different dialing modes from which the administrator can choose to apply to this campaign. The fields displayed in this tab vary according to the chosen mode.




**Operator:** to define a default telecom operator for the campaign.

**Call attempts**: to define how often a call must be attempted before being considered « unreachable ».

**Max ring number**: to define the maximum number of rings the system waits before considering a call « no answer» and going to the next one. The duration is shown between brackets. It's also possible to indicate directly the duration by using the **In sec** check box.

The next parameters are only available for preview type:

**Auto. call after [] seconds** : indicates the delay the system waits before automatically dialing the previewed phone number.

**Use agent frameset default parameter**: if this box is checked, the agent frameset parameters are used instead of the fix delay defined before. These parameters are set during FrameSet script edition.

The next 2 parameters are the same for the dialing types predictive and predictive without agent.

**% Retention**: maximum number of abandoned calls before going in overflow mode.

**Average wait between 2 calls**: this field indicates the average waiting time between 2 calls.

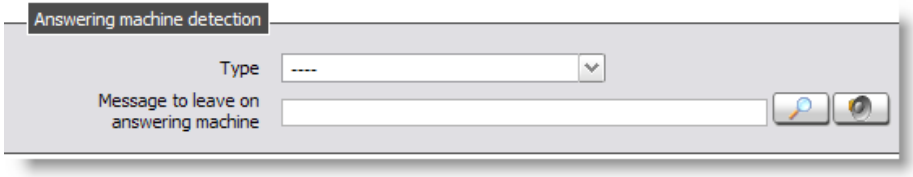
In case of predictive without agent mode, supplementary fields appear:

**Lines number** : max quantity of lines that the system can use for outbound calls

**Disable**: allows not using a max quantity of lines.

**Onnet script**: allows indicating a specific script used.

The next part **Answering machine detection** is shown in case of progressive and predictive modes.



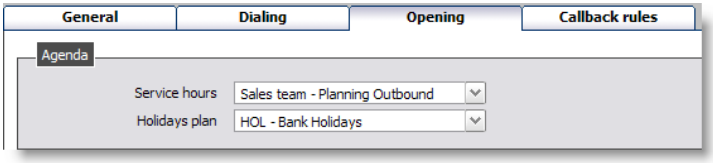

**Voice analyse**: indicates if the voice detection system must be activated in order to detect calls answered by machines.

**Transition detection**: indicates if the transition (digital – analogue) detection must be activated to detect transfer to voice mail.

Next to these fields, an input zone allows to specify phone prefixes to activate these detections. (* means: no specification, all the phone numbers will be involved.)

## Opening tab

This tab lets you define when a campaign is running.

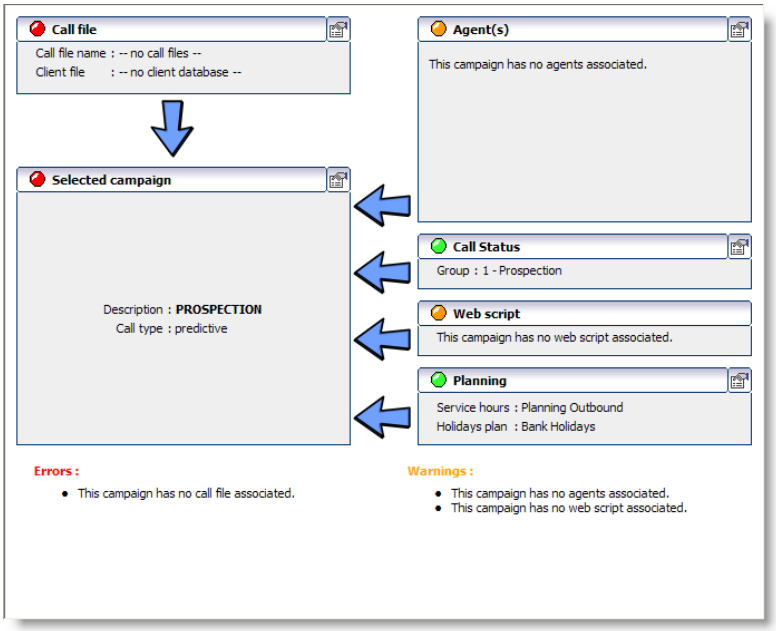



**Service hours**: the administrator selects the campaign's opening hours from the list. This time schedule is defined in the planning configuration as described in section « **Erreur ! Source du renvoi introuvable.** ».

**Holidays plan**: to define the schedule in case of closing days. See section « **Erreur ! Source du renvoi introuvable.** ».

## Campaign Graphic View

To run a diagnostic of the selected campaign and to obtain a graphical representation of the elements that may have to be corrected or added in order for the campaign to work properly.


Call file
Call file name : -- no call files --
Client file : -- no client database --
Agent(s)
This campaign has no agents associated.
Selected campaign
Description : PROSPECTION
Call type : predictive
Call Status
Group : 1 - Prospection
Web script
This campaign has no web script associated.
Planning
Service hours : Planning Outbound
Holidays plan : Bank Holidays
Errors :
This campaign has no call file associated.
Warnings :
This campaign has no agents associated.
This campaign has no web script associated.

The elements that form the (outbound) campaign are presented and regrouped in frames: **Agents**, **Call file**, **Call Status**, **Web Script** and **Planning**.

a green light means that the elements are correctly configured.

an orange light means that warning messages have been detected with regard to the elements. The campaign can be launched, but it will not function perfectly.

a red light means that warning messages have been detected for certain elements. The campaign cannot be launched.

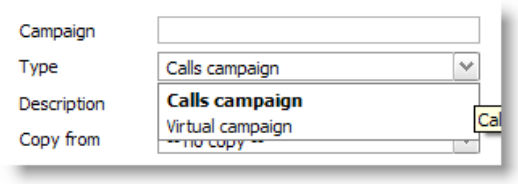
By clicking on the button in the corner of a frame, you can directly access the configuration window of the elements from the frame in question.

Underneath, the list of **Errors** and **Warnings** is shown.
A campaign for which warnings have been detected can be launched, but not all of its functions will work properly.

If you leave the Campaign Graphic View open, your modifications on the campaign in question are immediately analysed and shown in the graphical window. In other words, changing the active campaign will automatically adapt its graphical representation.

### 8.2.3 MULTIPLE OUTBOUND CAMPAIGNS (VIRTUAL CAMPAIGNS)

The purpose of a virtual campaign is to gather some outbound campaign together to be called as a single campaign. The different callfiles of each campaign will be read as one callfile. This feature allows grouping campaigns reaching the end of the callfile in order to increase the amount of records to call as well as the agent's productivity.
When creating a new campaign, you'll be given the choice to choose between creating a single campaign (**Calls campaign**) or a group of outbound campaigns (**Virtual campaign**).



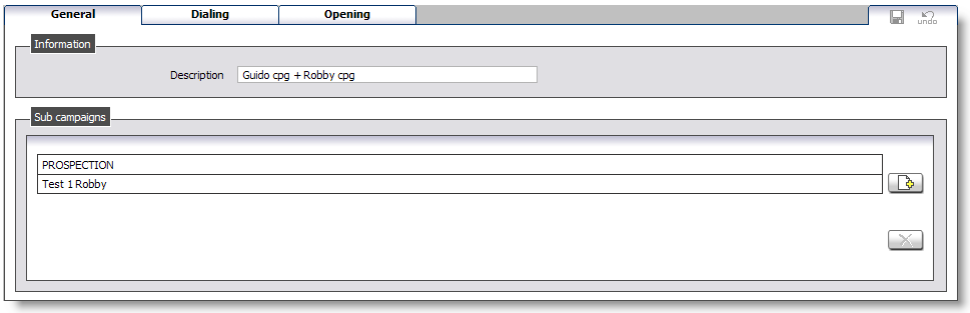

Make sure to choose "Virtual campaign" for creating a group of outbound campaigns.

Once created the different options tabs provide access to the following information:

**General**: used to modify the global configuration of the selected campaign (description, call file, screen script…)
**Dialing**: used to define the dialing mode, the operator and other parameters.
**Opening**: used to define the service opening hours.

## General tab

In this tab you can configure the campaign's general parameters.

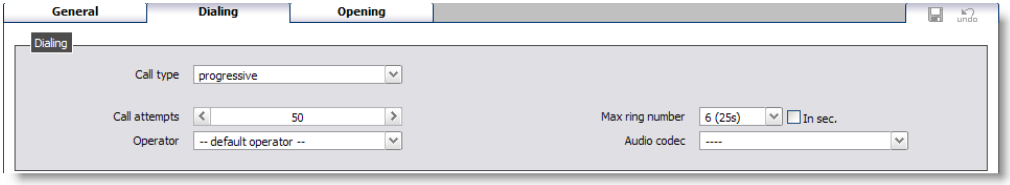



**Description**: name to the outbound campaign.
**Sub campaigns**: allows including outbound campaigns to the group

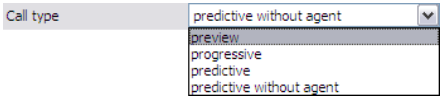
Press or to add or delete a campaign from the group.

## Dialing tab

This tab lets you define and configure the dialing mode for the campaign. This “dialing” tab is slightly different from the “dialing” tab of the single campaign. You can choose the dialing mode but you can’t activate the answering machine detection, nor can you parameter the predictive.

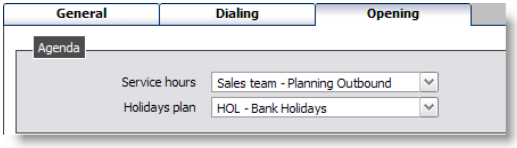



**Call type**: this list shows the different dialing modes from which the administrator can choose to apply to this campaign. Please refer to page 132 for more information about the different dialing modes. The fields displayed in this tab vary according to the chosen mode.




## Opening tab

This tab lets you define when a campaign is running.




**Service hours**: the administrator selects the campaign’s opening hours from the list. This time schedule is defined in the planning configuration as described in section « **Erreur ! Source du renvoi introuvable.** ».

**Holidays plan**: to define the schedule in case of closing days. See section « **Erreur ! Source du renvoi introuvable.** ».

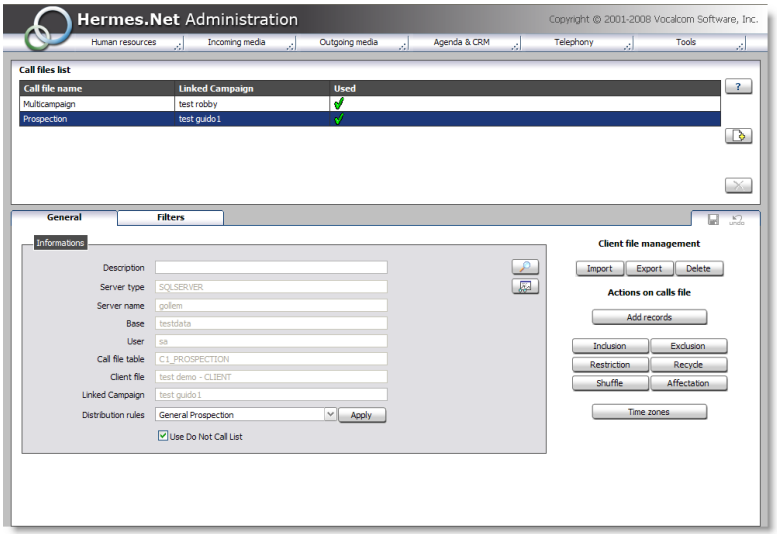
## Call File / Customer File

An outbound campaign needs two file/tables to work properly, a **Call file** and a **Customer file**. Both these tables are synchronised with a “Unique key” system that updates both tables when a call is made. Once synchronised, the callfile is linked to the outbound campaign.

**CALL FILE** = table containing data concerning the **call** itself: phone n° to call, date/time of call, call duration, call status, etc. The call file contains the list of telephone numbers that the ACD must dial for an outbound campaign. As soon as a call is finished, its result is stored in this file.

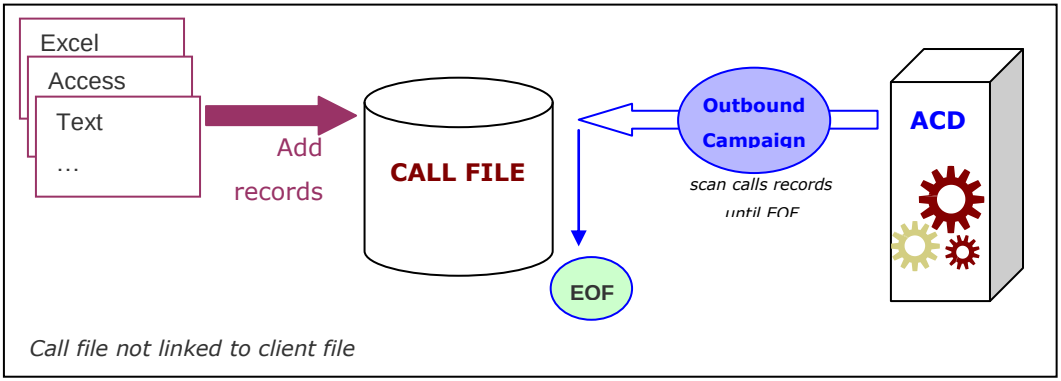
**CUSTOMER FILE** = table containing data concerning the **contact**: Last name, First name, Address, zip code, etc. The customer data show on the agent’s scripts comes from this file.

The **Call File** menu screen allows you managing the different **callfiles** and **customer files** used on the different outbound campaigns, each of them are created empty and then filled in with information coming from: SQL/Oracle tables, Text files, MS Excel tables, MS Access tables using the “**Import**” and “**Add records**” buttons.



## Scheme 1 : Call file not linked to client file

The next scheme describes relationship between call file and the Vocalcom system. The call file is first created empty, and afterwards client records are imported into this file from data sources like text file, Excel, Access, Oracle or SQL table: this is the **Add records** operation.
Once the file is filled in, the linked outbound campaign runs and scans it in order to find calls to dial. The call result is stored in the corresponding call record.
Inclusion, exclusion and restriction are operations used to increase or decrease the records set to be used by the campaign.



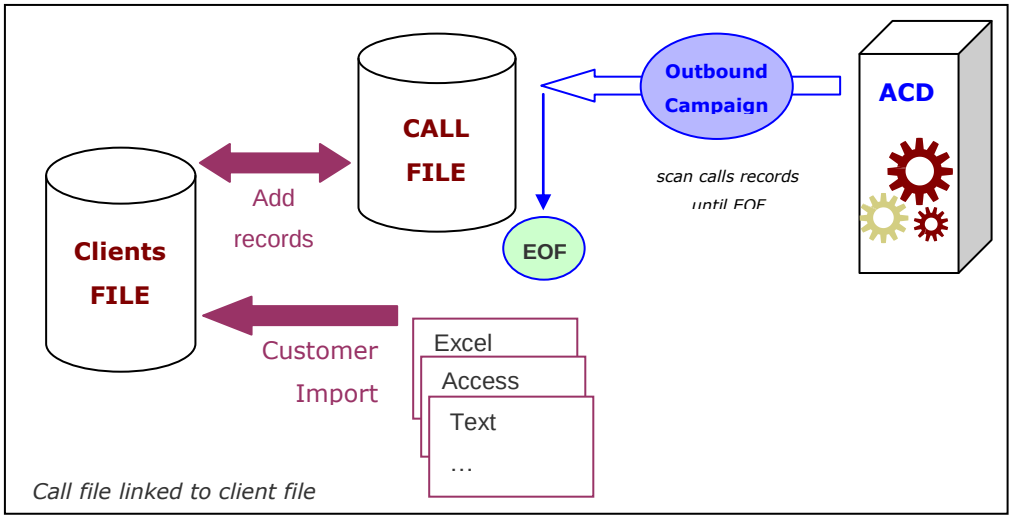

*Call file not linked to client file*

## Schema 2 : Call file linked to client file

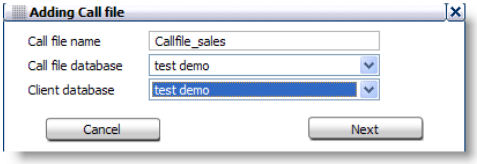
The next scheme describes the same relationship in case of client file use. The call file is first created empty and associated to an existing client file. This client file is afterwards filled in with client data using data sources like text file, Excel, Access, Oracle or SQL table: this is the **Customers Import**.

Once the client file is filled in, we have to perform the **Add Records** operations in order to fill in the call file. The linked outbound campaign runs and scans the call file in order to find calls to dial. The call result is stored in the corresponding call record.

Inclusion, exclusion and restriction are operations used to increase or decrease the records set to be used by the campaign into the call file.

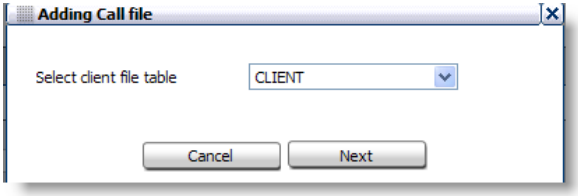



Use the button to create a new empty call file. By clicking on the button, a dialog window **Adding Call File** appears to enter the data of the new file.

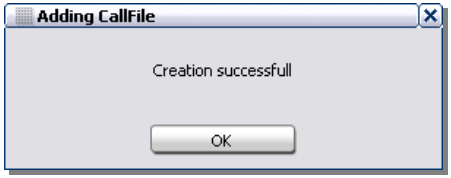


You'll need to enter a name for the new call file (**Call File name**), the database in which it will be stored (**Call File database**) as well as the database where the Customer file is stored (**Client database**). Both tables are usually stored in the same database.
If you decide to create a call file not linked to a customer file, simply leave the **Client database** field empty.

The lists **Call file database** and **Client database** show the connections that have been assigned to the current site through the **Database** screen. See section « 2.1.5 SITE OPTIONS - DATABASE tab » on page 33 for more information on defining connections and assigning them to a company.

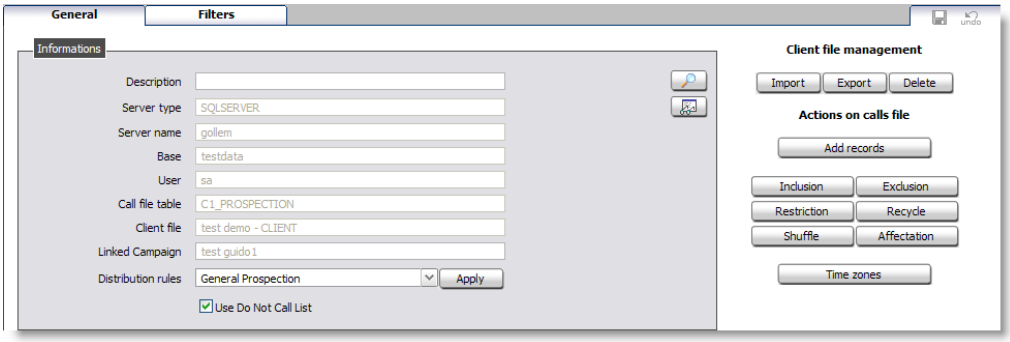



In case of a call file linked to a customer file, the following step lets you choose the (existing) table that will be used as customer file. A message then confirms the creation of the call file.




The following window serves to verify and adjust several parameters.

## GENERAL TAB




In this example, the call file is linked to the customer file « Customers » using the connection "TESTDATA". Two import buttons are presented on the right side: **Import customers** and **Add records**. If the call file is not linked to a client file, only the **Add records** button is available.

**Description**: name of the callfile.

**Server type, Server name, Base, User**: these parameters are determined upon defining the connection. They cannot be modified here.

**Callfile table:** name of the newly created table to fill the call file.

**Customer file**: name of the linked client file.

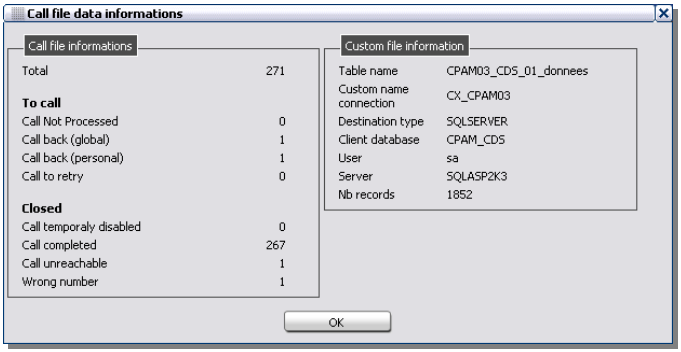
**Linked campaign**: to reserve this file for a defined campaign. Once the file has been used in this campaign, a ✔ symbol appears in the upper list next to its name.

**Use Do Not Call List**: Check this box to indicate that a supplementary filter based on the "Do Not Call list" is applied on the file (these numbers won't be dialed). To find more information about the "Do Not Call" list creation, read section "**Erreur ! Source du renvoi introuvable.**" on page 47.

On the right side of the screen, several buttons allow you to execute specific actions on the file.

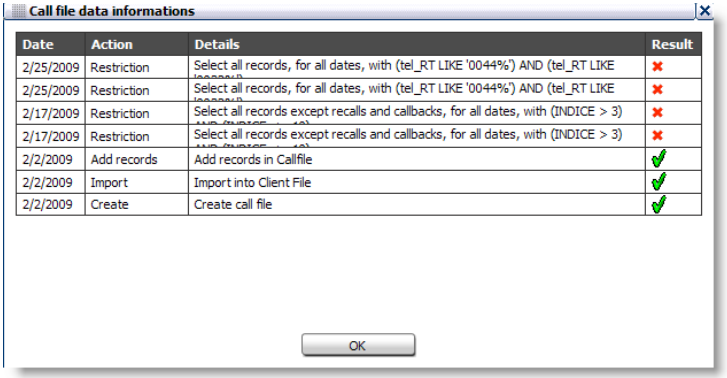
## Callfile Information button

The button is used to display data about the callfile and its content.

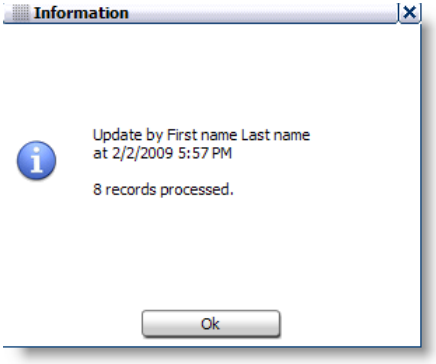



## Call file actions History button

The button can be used to open a history overview window. All the actions performed on the call file are shown here (creation, import, export, information display, records adding…).


Call file data informations
Date Action Details Result
2/25/2009 Restriction Select all records, for all dates, with (tel_RT LIKE '0044%') AND (tel_RT LIKE
2/25/2009 Restriction Select all records, for all dates, with (tel_RT LIKE '0044%') AND (tel_RT LIKE
2/17/2009 Restriction Select all records except recalls and callbacks, for all dates, with (INDICE > 3)
2/17/2009 Restriction Select all records except recalls and callbacks, for all dates, with (INDICE > 3)
2/2/2009 Add records Add records in Callfile
2/2/2009 Import Import into Client File
2/2/2009 Create Create call file
OK

When you click on a line of the table, the next window opens with operation details:

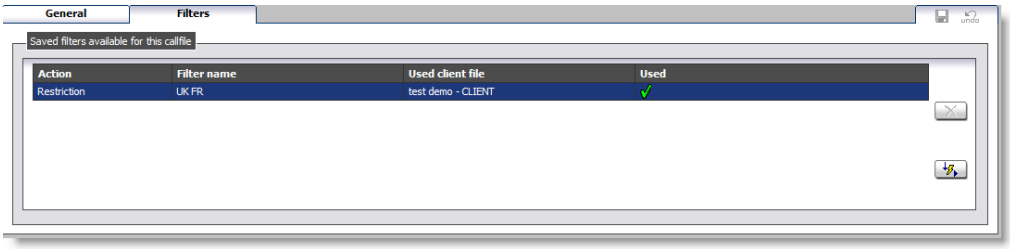



The date and time of the operation, the identifier of the user that made the operation, the detailed number of records sorted by result are shown here.

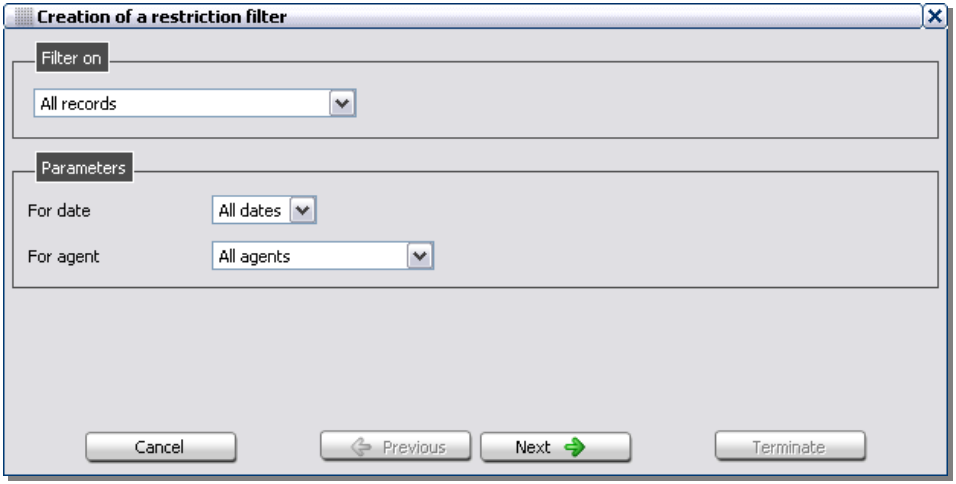
## FILTERS TAB

This tab can be used to create filters based on the call file structure and data to specifically select records to be called on the campaign.
For example, a filter will activate only home phone numbers of a call file. This filter can be applied directly on this screen, or it can be scheduled every week day after 18h.

The list shows all the created filters.




With the and buttons on the right side of the list, you can add or delete filters.
A new filter is created using the “RESTRICTION” action on the callfile (see page 169):

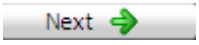


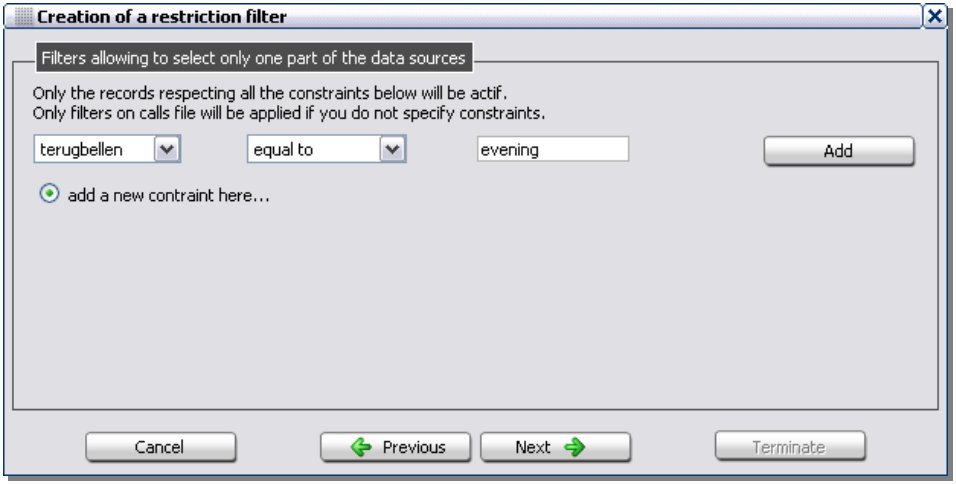

**Filter on**: the list suggest selecting « all records », or « all records except recalls and callbacks » or « recalls and callbacks ». The filter indicates the call type(s) to be selected and activated.

**Parameters**: to indicate the conditions to be used are defined at the level of the client file.

**For date**: this condition lets you select only those calls before a certain date or interval of dates. By selecting one of the values suggested in the list, you can select one or more dates from a calendar accessible through the button.

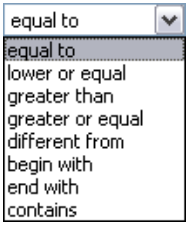
**For agent**: this list lets you select a particular agent.

Click on  to go to the next phase.


Creation of a restriction filter
Filters allowing to select only one part of the data sources
Only the records respecting all the constraints below will be actif.
Only filters on calls file will be applied if you do not specify constraints.
terugbellen
equal to
evening
Add
add a new contraint here...
Cancel
Previous
Next
Terminate

This step is only visible when the call file is linked to a customer file.

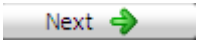
On this screen, **Filters allowing to select only one part of the data source**, lets you define a selection filter based on one or more restrictions.



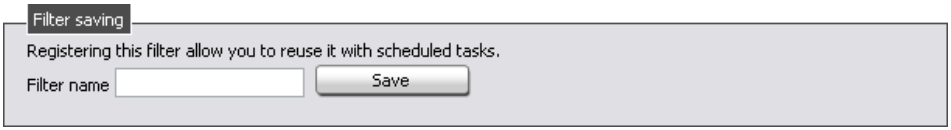

The first field indicates the value to be tested, the second field is a list suggesting the most frequently used logical operations and the third field lets you enter the value to be tested.

If the **add a new constraint here…** is checked, simply enter the values in the 3 fields and click on

to validate the condition.

Click on 

to go to the last step.



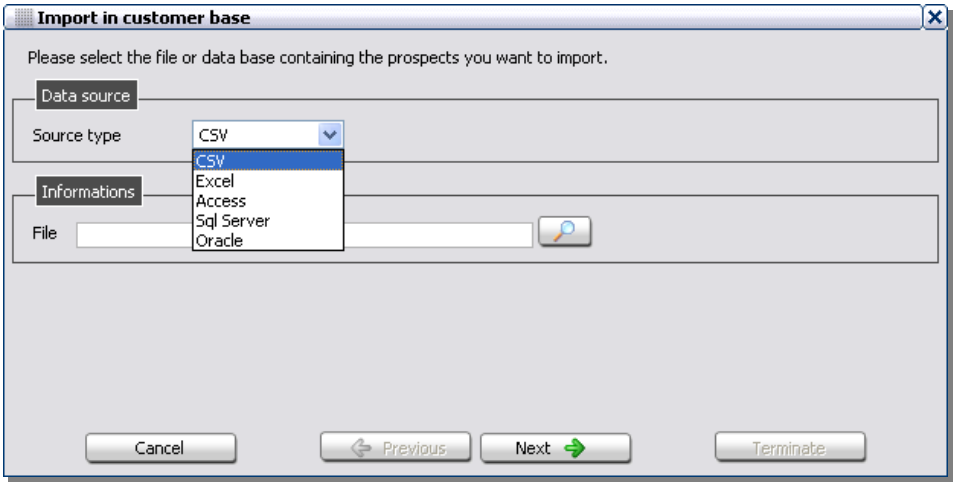

This screen allows saving the filter.

It's possible to apply directly the filter on the call file using the button .

The next section shows how to apply the filters using the scheduler.

## IMPORT data in CUSTOMER FILE (CLIENT FILE MANAGEMENT)

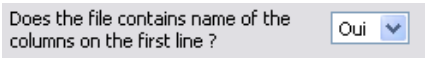
With this function you can feed the clients table linked to the call file with prospects from different source formats.




This window shows the source types **CSV** (comma separated), **Excel**, **Access**, **SQL Server** and **Oracle**.

Once you have selected the type, you need to enter the parameters to locate the file:

**File**: name of the file and its location; in case of a MS Access File, also enter a **User** ID and **password.** (For a MS Excel file, a field also asks if the first column contains the title).

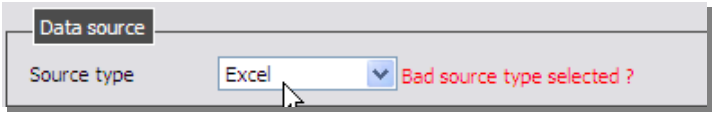



In case of a SQL server you'll need to select a **server** and **database** that contain the records, as well as a **User** ID and **password.**

Or the name of the **Instance** (Oracle DB) containing the records and a **user/password** in case of an Oracle database.

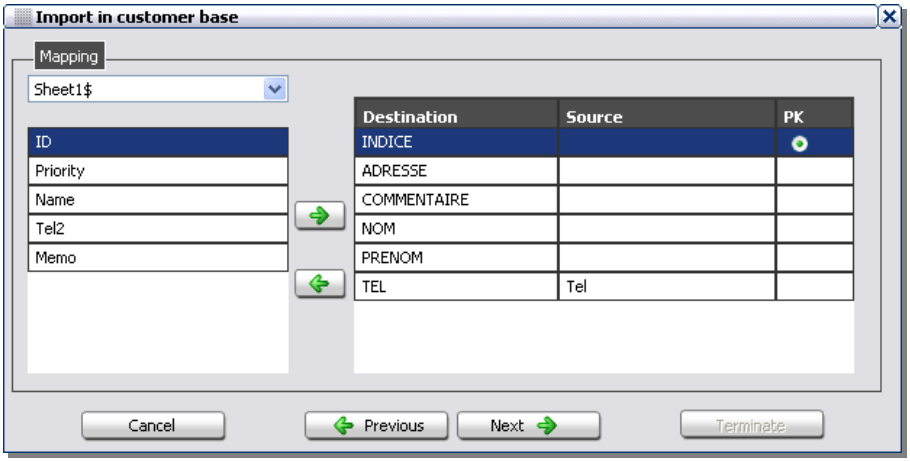
When the file has been located and confirmed, the application copies it and renames it in a particular directory of the server to collect all files used for uploading. The new name assigned

to the file contains the current date and hour. In case of an error with regard to the choice of file, the format or extension, a message appears next to the source type:




The administrator must verify his choice or change the source type.

The administrator then clicks on the Next button to go to the next phase. The window « Import in customer base» is displayed:




Example of an Excel file used here:

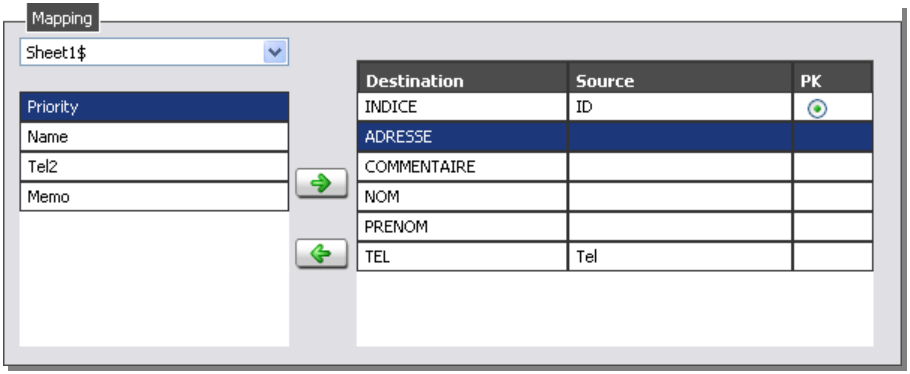
| | A | B | C | D | E | F |
|---|---|---|---|---|---|---|
| 1 | **ID** | **Priority** | **Name** | **Tel** | **Tel2** | **Memo** |
| 2 | 1 | 2 | ROBERT | 023344343 | 0465998833 | If possible call him today |
| 3 | 2 | 3 | LAMBERT | 0475434343 | 059311211 | Memo2 |
| 4 | 3 | 1 | BELGACOM | 022021111 | | Memo3 |
| 5 | | | | | | |

On the left side it displays the different values extracted from the source file and it suggests matching them to database fields:

The first list indicates a reference to a file in case of a text file source and a sheet in case of an Excel document with several sheets.

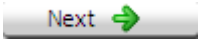
The left zone indicates the different fields detected in the file, and the right zone presents the fields detected in the client file. The correspondence between the two can be made by using the and arrows . The system already linked the fields identified with the same name (field “Tel”).

Click on the left field corresponding to the **ID** column, and click on the destination column. Click on to link the two. « ID » disappears from the left zone and reappears in the **Source** column of the right list.

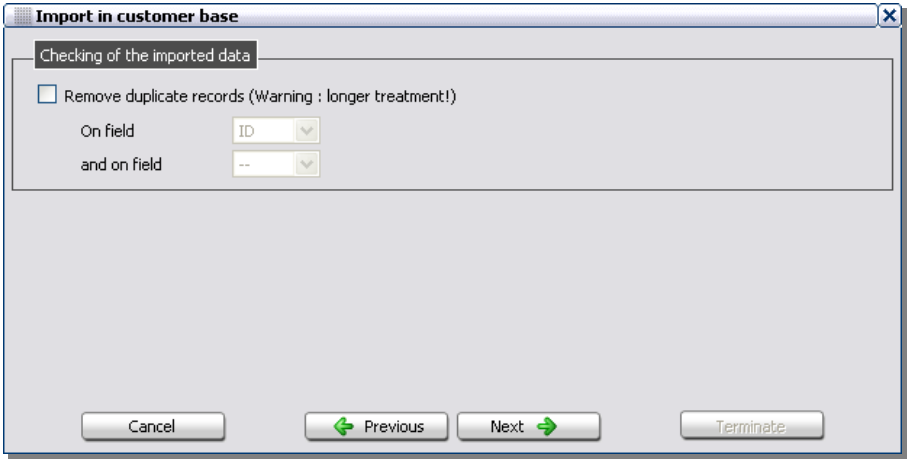


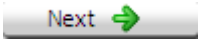

In this example, **ID** was assigned to the field **INDICE; Tel** was assigned to the field **TEL**.

In the **PK** column you can indicate which column of the destination file is to be considered as the Primary Key of the table.

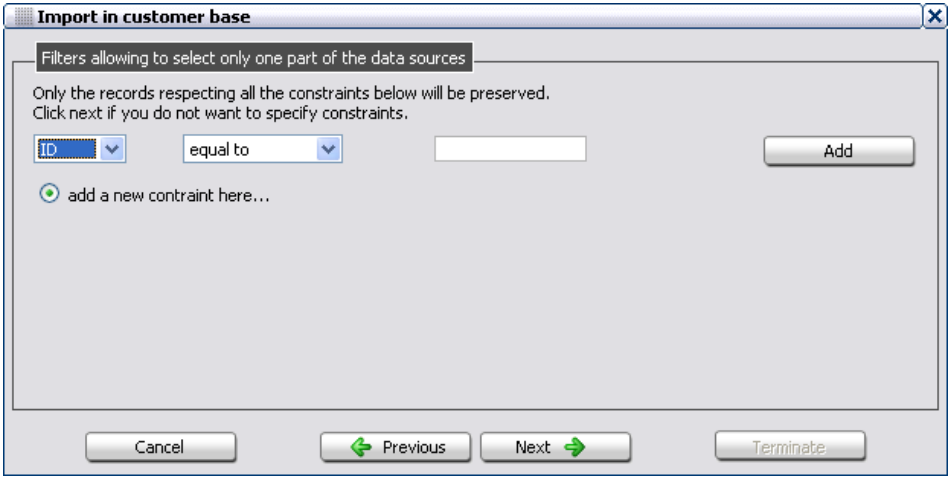
Once all fields have been matched, clicking on the 

button takes you to the next step: verification of the imported data.



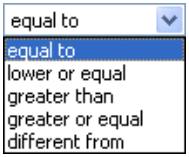

Click on  to go to the next phase.




Import in customer base
Filters allowing to select only one part of the data sources
Only the records respecting all the constraints below will be preserved.
Click next if you do not want to specify constraints.
ID
equal to
Add
add a new contraint here...
Cancel
Previous
Next
Terminate

In the window **Filters allowing selecting only one part of the data sources**, you can define the file selection conditions.

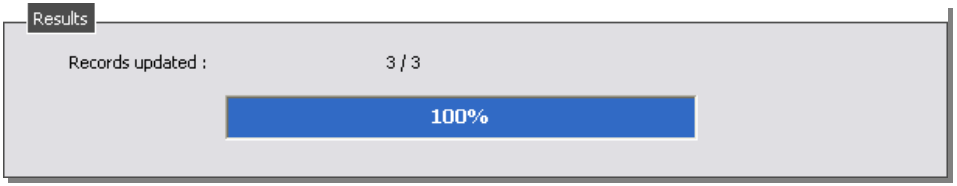
The first field indicates the value to be tested, the second field is a list suggesting the most frequently used logical operations and the third field lets you enter the value to be tested.



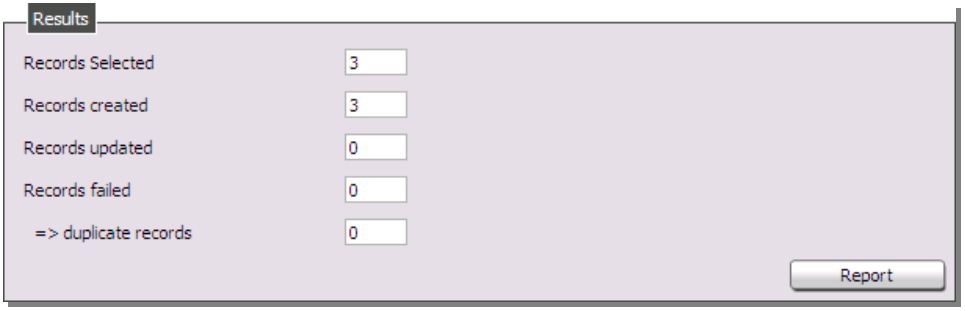

If the box "**add a new constraint here"…** is checked, simply enter the values in the 3 fields and click on the Add button to validate the condition.

Click on Next to go to the import.

A progression window shows the number of records created.

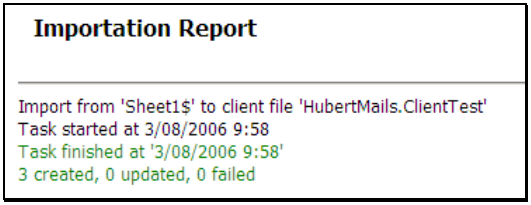



When finished, this window shows a summary of the operations.




Click on the Terminate button to close the window.

The Report button can be used to generate an importation report. That allows keeping trace of performed operations and results (source details, date, time, updated and failed records number).


Importation Report
Import from 'Sheet1$' to client file 'HubertMails.ClientTest'
Task started at 3/08/2006 9:58
Task finished at '3/08/2006 9:58'
3 created, 0 updated, 0 failed

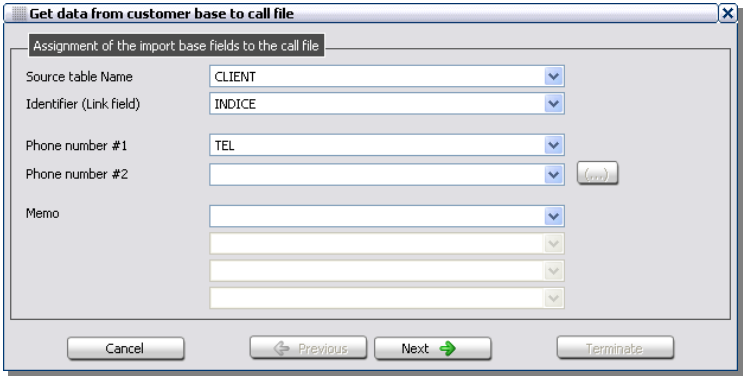
## ADD RECORDS (ACTIONS ON CALLS FILE)

With this function you can feed the call table with records from the client file (if the call file is linked to a client file), or from a text file, Excel…
The procedure is different for files linked to a client file or files not linked to a client file.

### Call file linked to a client file

If a call file is linked to a client file, you can only generate records from the linked client file in order to prevent synchronization problems between the two files. In this case, the wizard asks you to select the source table and the field identifying client records to be transferred. If the client file is empty, the following error message appears:

If there are records in the file, the following window is displayed.




**Source table name**: to select the table containing the files to be imported.

**Identifier (Link field)**: to select the field that will be used to identify the records. If no field is indicated, this key will be generated by automatic numbering.

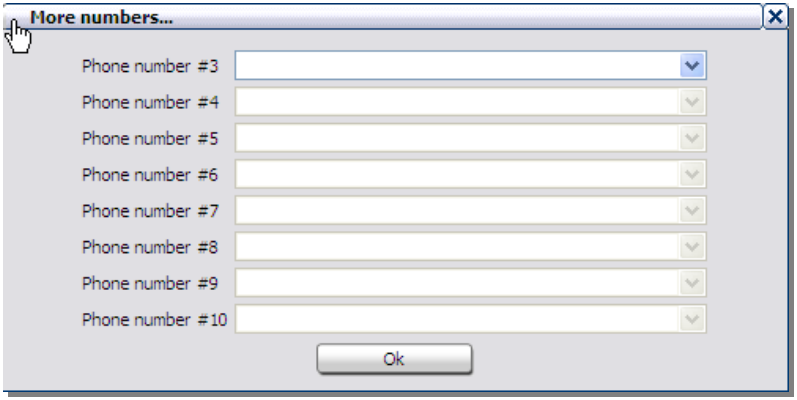
**Phone Number #1** and **Phone Number #2**: to select from the import table the two fields containing telephone numbers.

For these three fields, default values are suggested and can be changed.

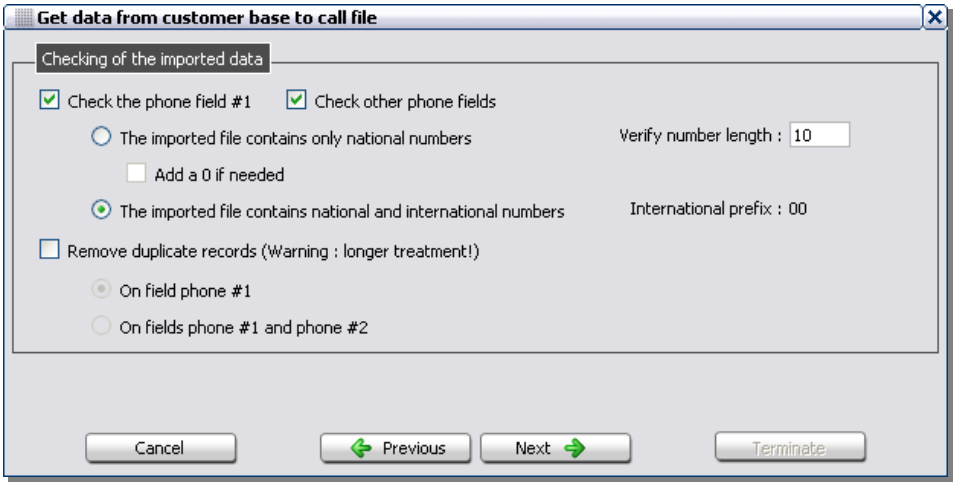
**Memo**: to select up to four fields that will be embedded and recorded in the Memo field of the call file.

The

button is used to open a window in which you can enter up to 8 additional fields of telephone numbers.



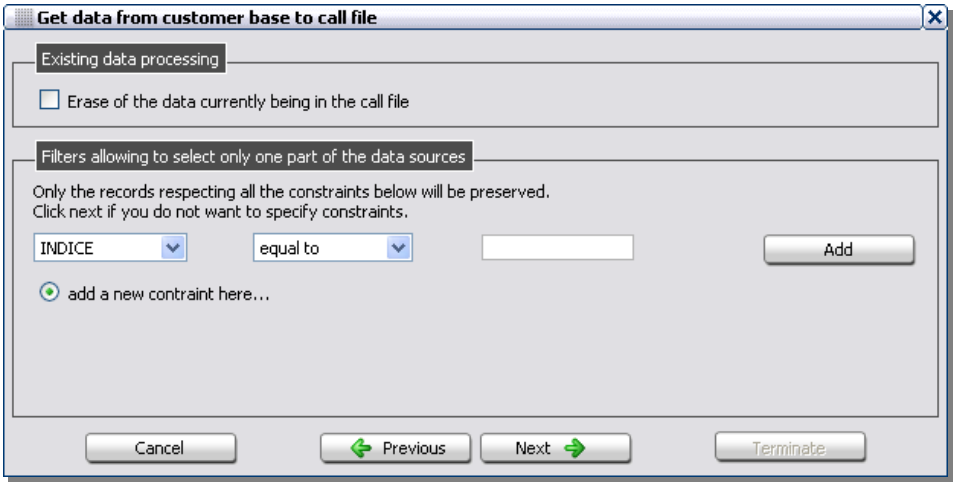
Click on Next to go to the next phase: verification of the imported data.


Get data from customer base to call file
Checking of the imported data
Check the phone field #1
Check other phone fields
The imported file contains only national numbers
Verify number length : 10
Add a 0 if needed
The imported file contains national and international numbers
International prefix : 00
Remove duplicate records (Warning : longer treatment!)
On field phone #1
On fields phone #1 and phone #2
Cancel
Previous
Next
Terminate

In this phase you can verify certain data specified before physically importing the records.

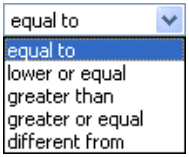
It allows you to do a preliminary check so as not to import wrong data into the call file.

Click on Next to go to the next step.


Get data from customer base to call file
Existing data processing
Erase of the data currently being in the call file
Filters allowing to select only one part of the data sources
Only the records respecting all the constraints below will be preserved.
Click next if you do not want to specify constraints.
INDICE
equal to
Add
add a new contraint here...
Cancel
Previous
Next
Terminate

The first part, **Existing data processing,** lets you indicate if you want to keep or delete the source file data.

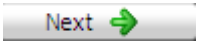
The second part, **Filters allowing to select only one part of the data source**, lets you define a selection filter based on one or more restrictions.




The first field indicates the value to be tested, the second field is a list suggesting the most frequently used logical operations and the third field lets you enter the value to be tested.

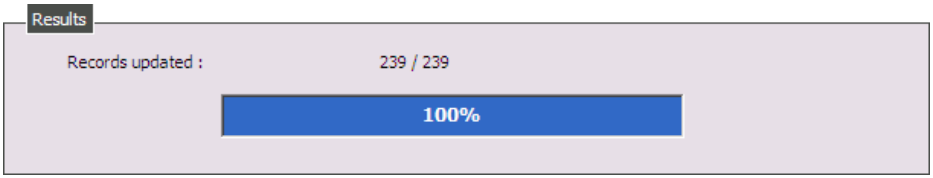
If the **add a new constraint here…** is checked, simply enter the values in the 3 fields and click on

to validate the condition.

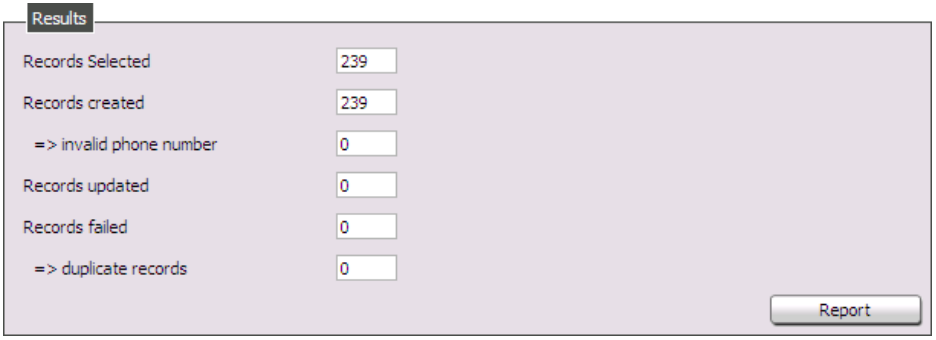
Click on 

to start the import.

A progression window shows the number of records created.




When finished, a window displays a summary of the operations.

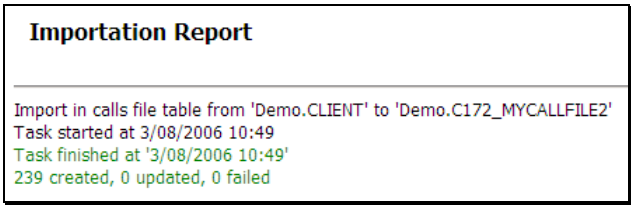



Click on

to close the window.

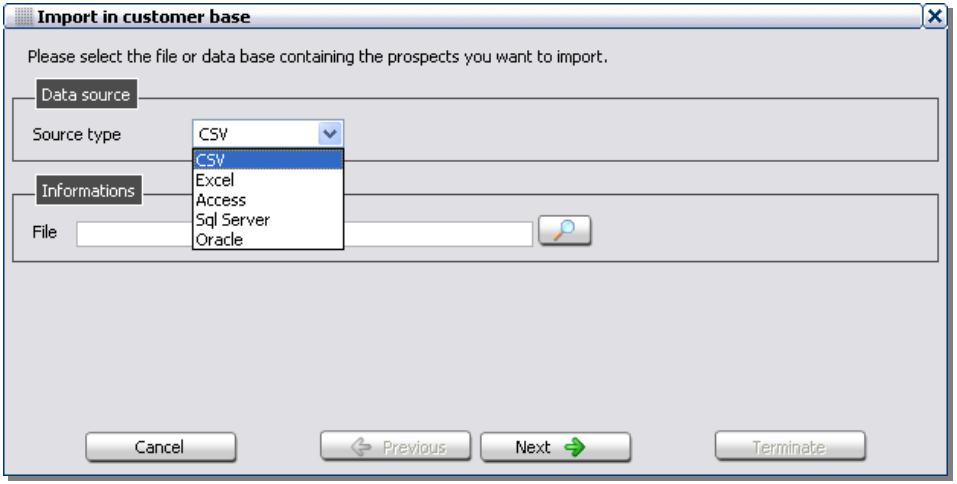
The

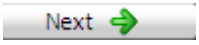
button can be used to generate an importation report. That allows keeping trace of performed operations and results (table source and destination, date, time, updated and failed records number).


Importation Report
Import in calls file table from 'Demo.CLIENT' to 'Demo.C172_MYCALLFILE2'
Task started at 3/08/2006 10:49
Task finished at '3/08/2006 10:49'
239 created, 0 updated, 0 failed

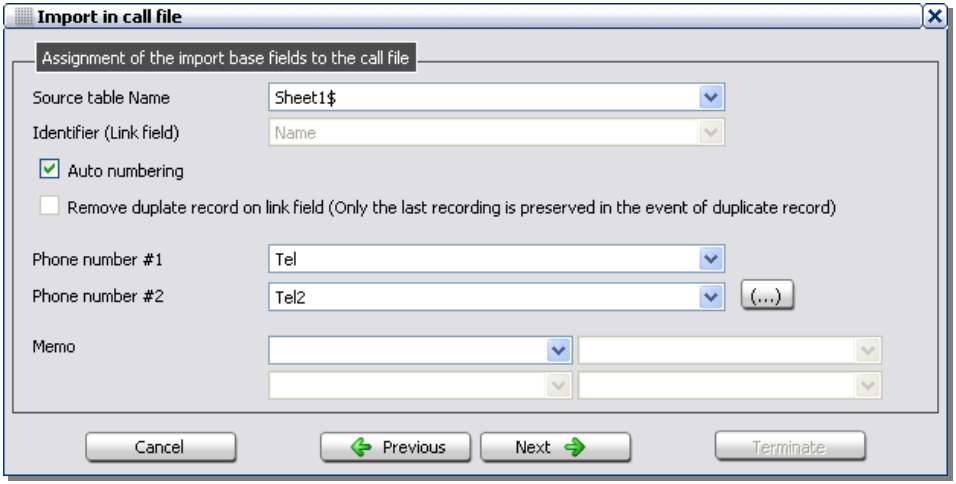
## Call file not linked to a client file

In case of a call file not linked to a client file, the first phase lets you select the data source:

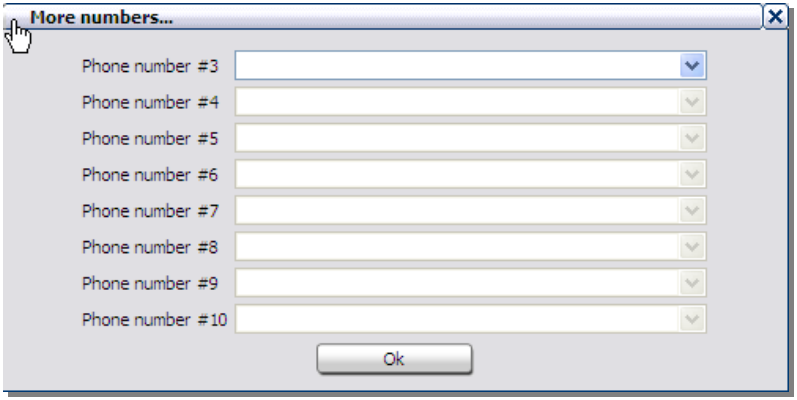



Click on 

to go to the next phase: assigning the fields used as keys to create the records.

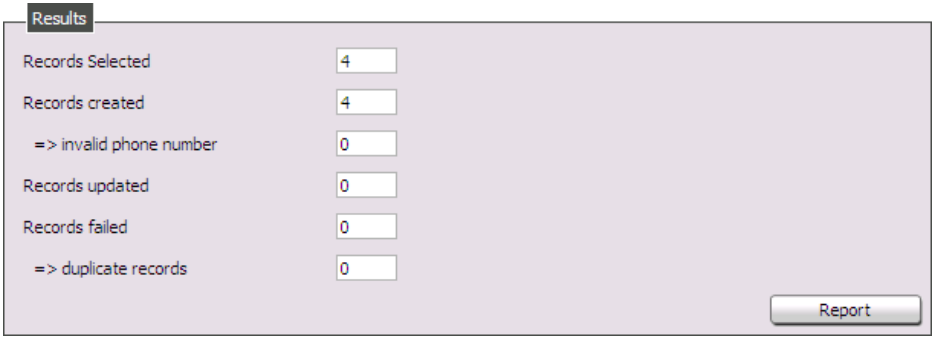



The (...) button lets you open a window in which you can enter up to 8 additional fields with telephone numbers.



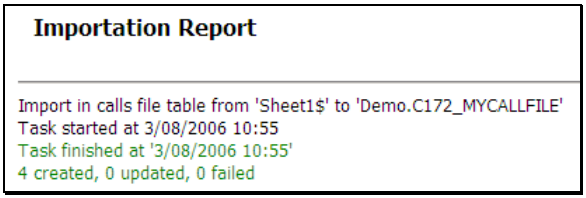

Click on Next to go to the next steps (identical to those of the call file linked to a client file). (See section « Call file linked to a client file » on page 166.)

At the end of the procedure, a window shows a summary of the operations.




Click on Terminate to close the window.

The Report button can be used to generate an importation report. That allows keeping trace of performed operations and results (source and destination table, date, time, updated and failed records number).

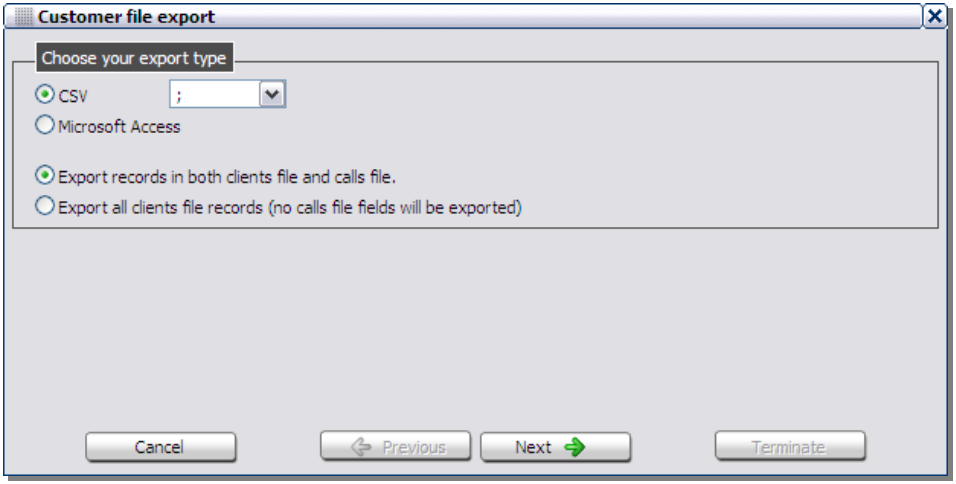

Importation Report
Import in calls file table from 'Sheet1$' to 'Demo.C172_MYCALLFILE'
Task started at 3/08/2006 10:55
Task finished at '3/08/2006 10:55'
4 created, 0 updated, 0 failed

## CLIENT FILE MANAGEMENT

### EXPORT CUSTOMERS

This option is only possible for call file linked to customers file, and cannot be executed if the customer file is empty.
It allows building a local file (text or DB MS Access) with client records found in the call file.

The first step is the output format selection.

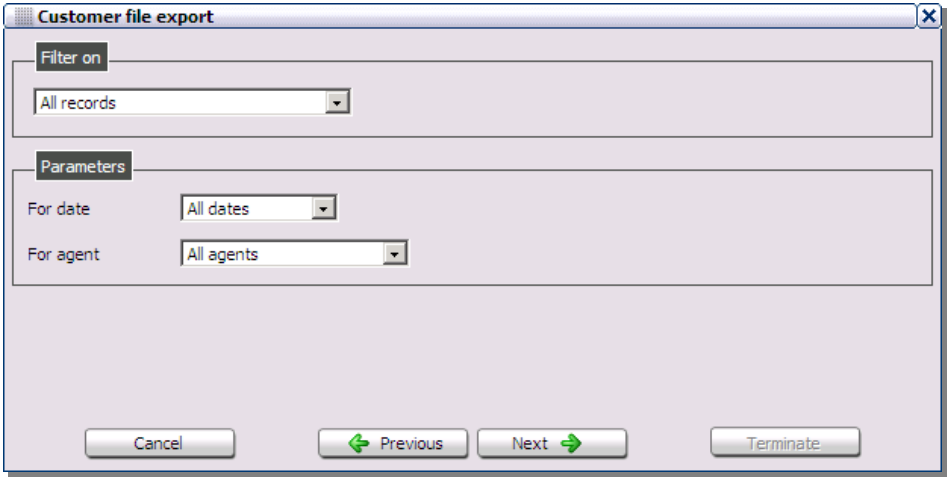



Select a format between **CSV** and **Microsoft Access**.

In case of **CSV** format, select the field separator between semicolon, comma or tab.

Select between the 2 next options: export client records already linked to calls (records present in both clients and calls files), or export all the client records, without checking the presence of a call in the calls file.

If you select the first option, the next step allows applying a filter on client records :

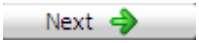


**Filter on**: the list suggest selecting « all records », or « all records except recalls and callbacks » or « recalls and callbacks ». The filter indicates the call type(s) to be included in the export.

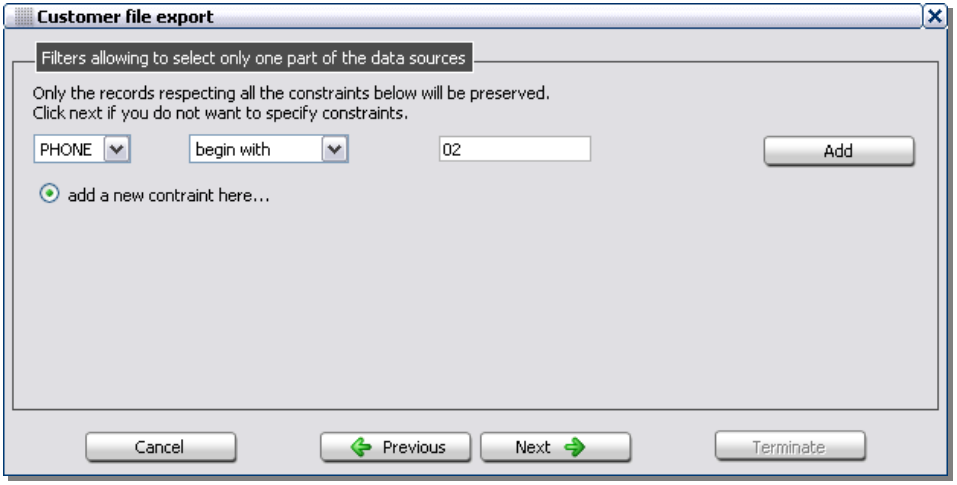
**Parameters**: to indicate the conditions to be used defined at the level of the client file.

**For date**: this condition lets you select only those calls before a certain date or interval of dates. By selecting one of the values suggested in the list, you can select one or more dates from a calendar accessible through the button.

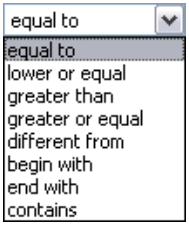
**For agent**: this list lets you select a particular agent.

Click on  to go to the next step.






In the window **Filters allowing selecting only one part of the data sources**, you can define the selection conditions.



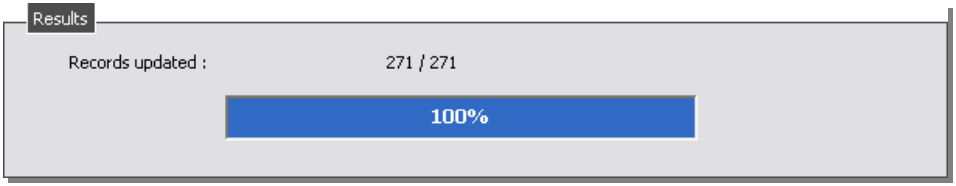

The first field indicates the value to be tested, the second field is a list suggesting the most frequently used logical operations and the third field

lets you enter the value to be tested.

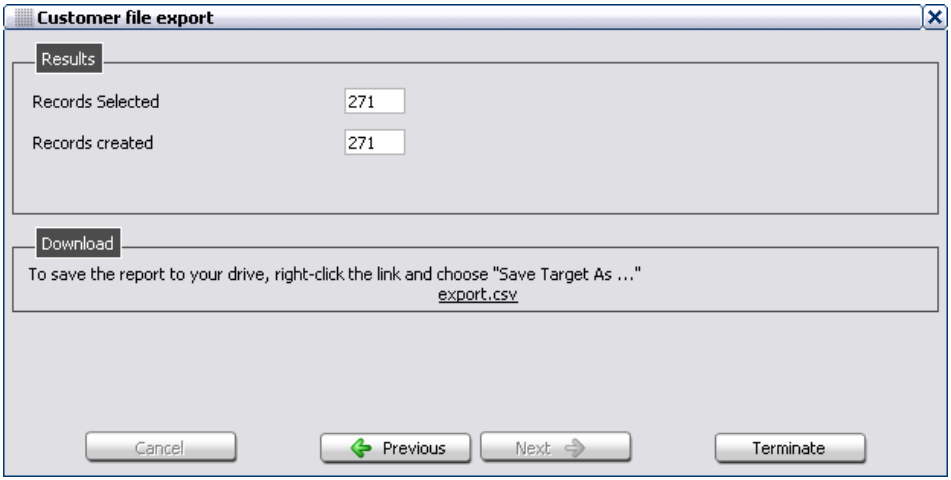
If the box "**add a new constraint here"…** is checked, simply enter the values in the 3 fields and click on the Add button to validate the condition.

Click on Next to go to the export.

A progression window shows the number of records created.




When finished, this window shows a summary of the operations.



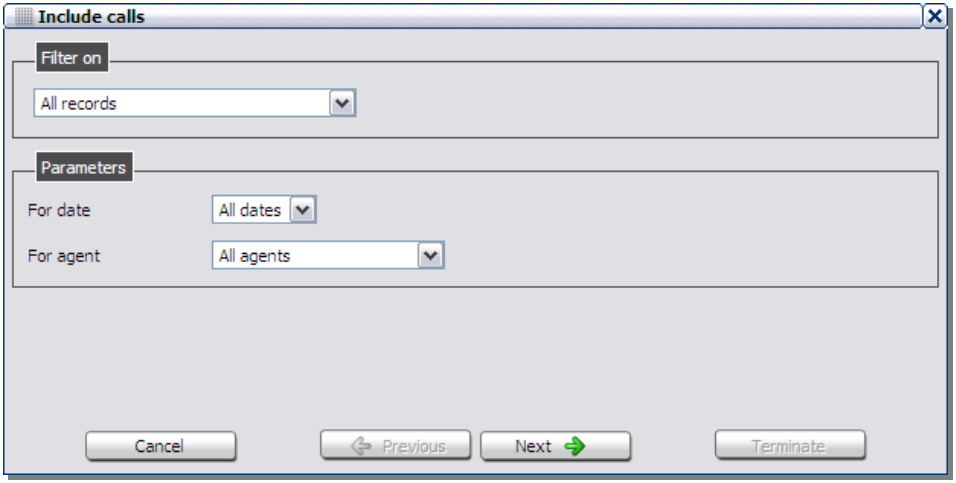

Right-click on the link at the bottom of the window to save the exported file onto your local machine.

Click on the Terminate button to close the window.

# ACTIONS ON CALL FILES

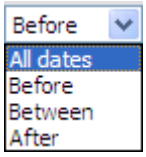
## Inclusion

In this window you can activate only certain records of the call table, thanks to a filter based on the call type, date and agent assigned to them.

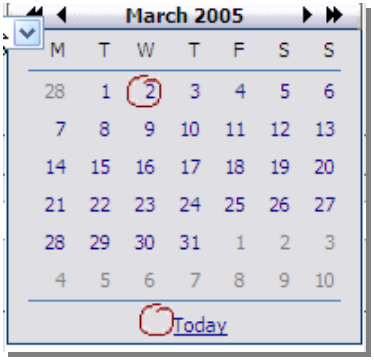



**Filter on**: the list suggests selecting « all records », or « all records except recalls and callbacks » or « recalls and callbacks ». This filter indicates the call type(s) to be activated.

**Parameters**: lets you indicate that the conditions to be used are those defined at the level of the client file.

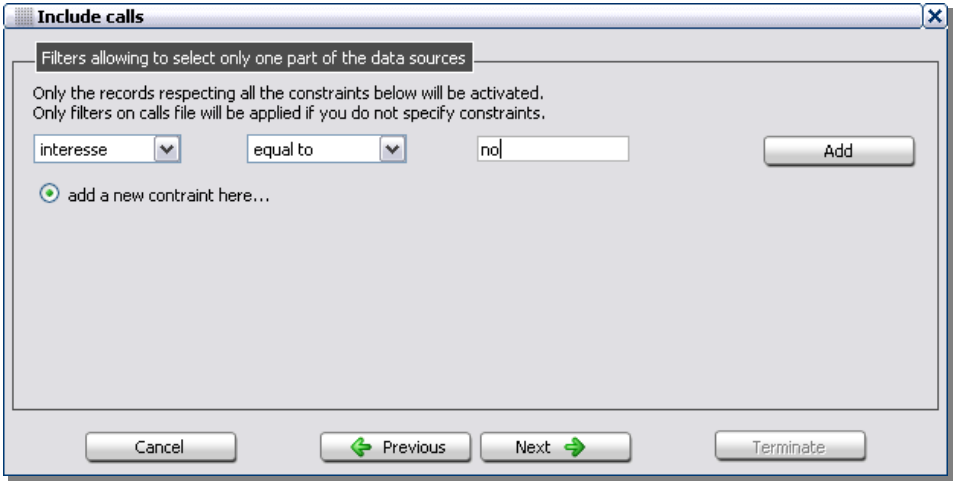



**For date**: this condition lets you select only those calls before a certain date or interval of dates. By selecting one of the values suggested in the list, you can select one or more dates from a calendar accessible through the button.




**For agent**: this list lets you select a particular agent.

Click on Next to go to the next phase.

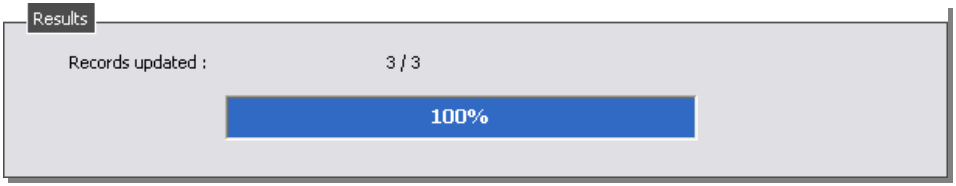

Include calls
Filters allowing to select only one part of the data sources
Only the records respecting all the constraints below will be activated.
Only filters on calls file will be applied if you do not specify constraints.
interesse
equal to
no
Add
add a new contraint here...
Cancel
Previous
Next
Terminate

This step is only visible when the call file is linked to a customer file.

On this screen, **Filters allowing to select only one part of the data source**, lets you define a selection filter based on one or more restrictions.

Click on Next to go to the next phase.

A progression window appears and shows the number of modified records.

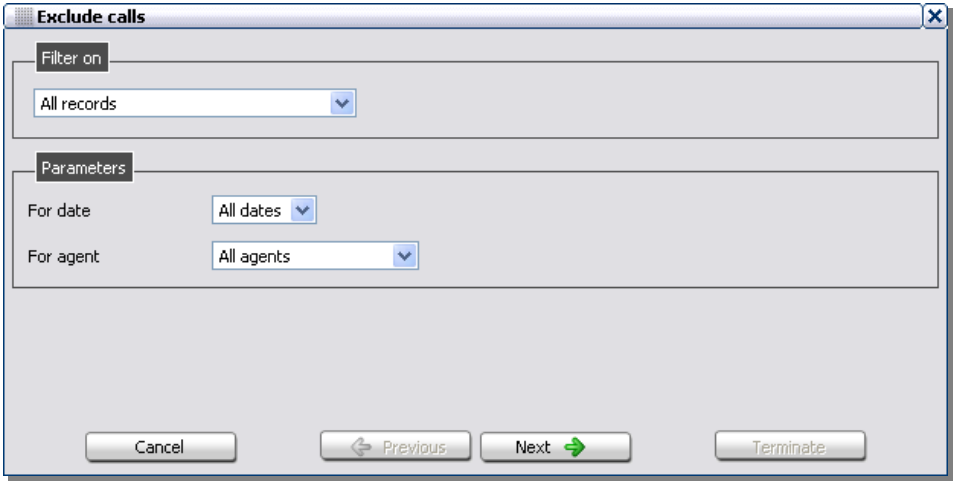



When finished, a window shows a summary of the operations.

Click on the button to close the window.


### Exclusion

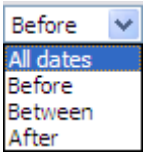
This window lets you deactivate certain records from the call table, thanks to a filter based on call type, date and the agent assigned to them.

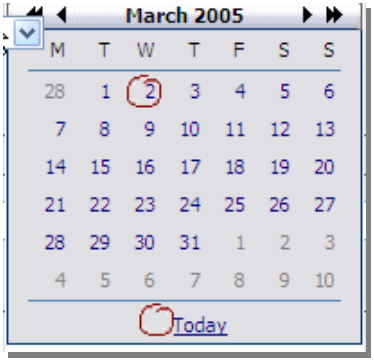



**Filter on**: the list suggest selecting « all records », or « all records except recalls and callbacks » or « recalls and callbacks ». This filter indicates the call type(s) to be de-activated.

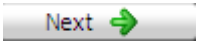
**Parameters**: lets you indicate that the conditions to be used are those defined at the level of the client file.

**For date:** this condition lets you select only those calls before a certain date or interval of dates. By selecting one of the values suggested in the list, you can select one or more dates from a calendar accessible through the button.

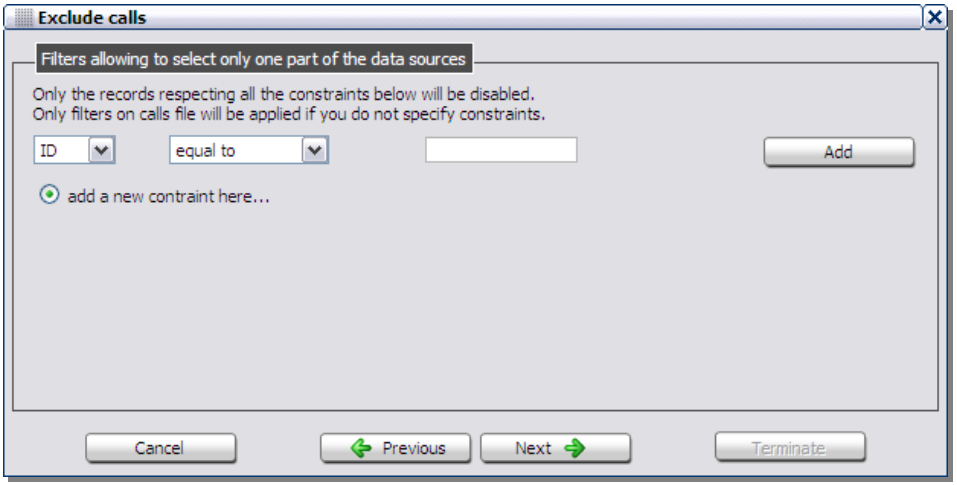





**For agent**: this list lets you select a particular agent.

Click on 

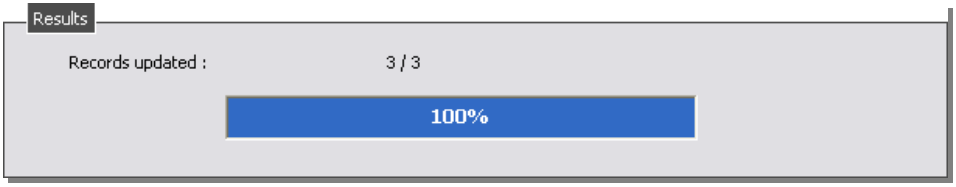
to go to the next phase.


Exclude calls
Filters allowing to select only one part of the data sources
Only the records respecting all the constraints below will be disabled.
Only filters on calls file will be applied if you do not specify constraints.
ID
equal to
Add
add a new contraint here...
Cancel
Previous
Next
Terminate

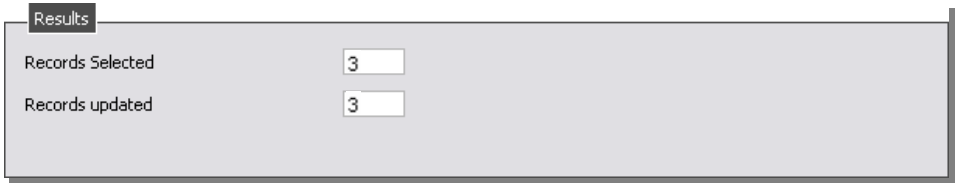
This step is only visible when the call file is linked to a customer file.

On this screen, **Filters allowing to select only one part of the data source**, lets you define a selection filter based on one or more restrictions.

A progression window appears and shows the number of modified records.




When finished, a window shows a summary of the operations.

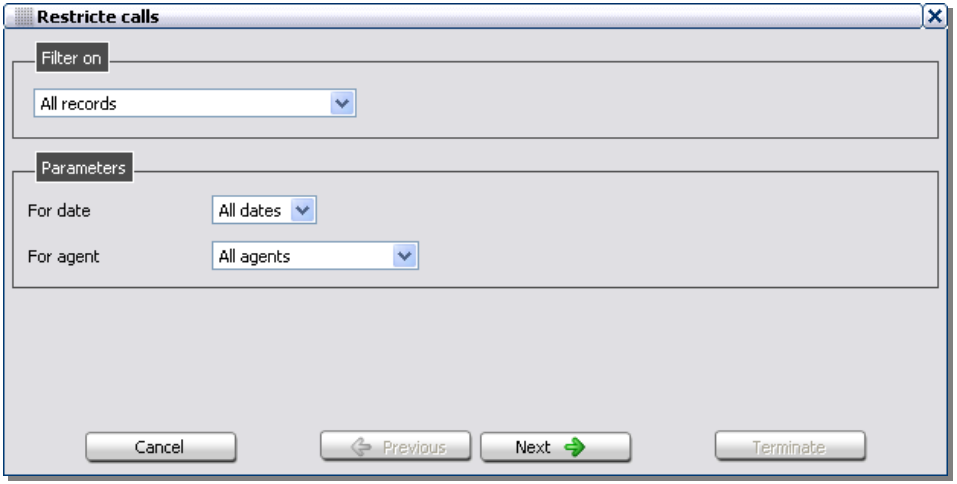



Click on the

button to close the window.

## Restriction

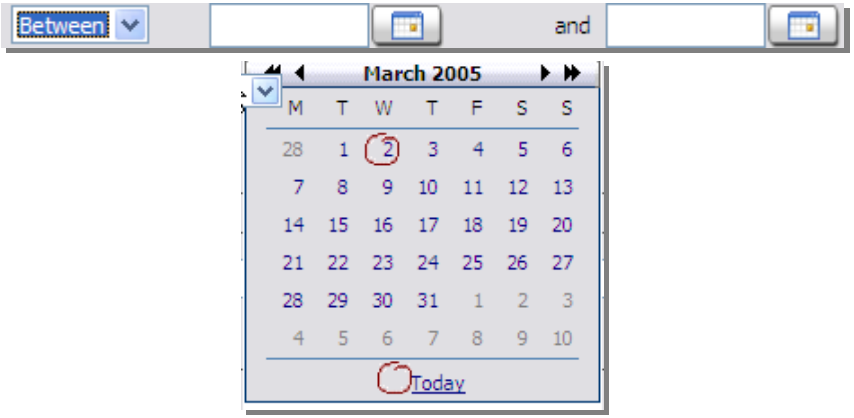
This window is used to restrict the call table to certain records, thanks to a filter based on call type, date and the agent assigned to them.




**Filter on**: the list suggest selecting « all records », or « all records except recalls and callbacks » or « recalls and callbacks ». The filter indicates the call type(s) to be selected and activated.

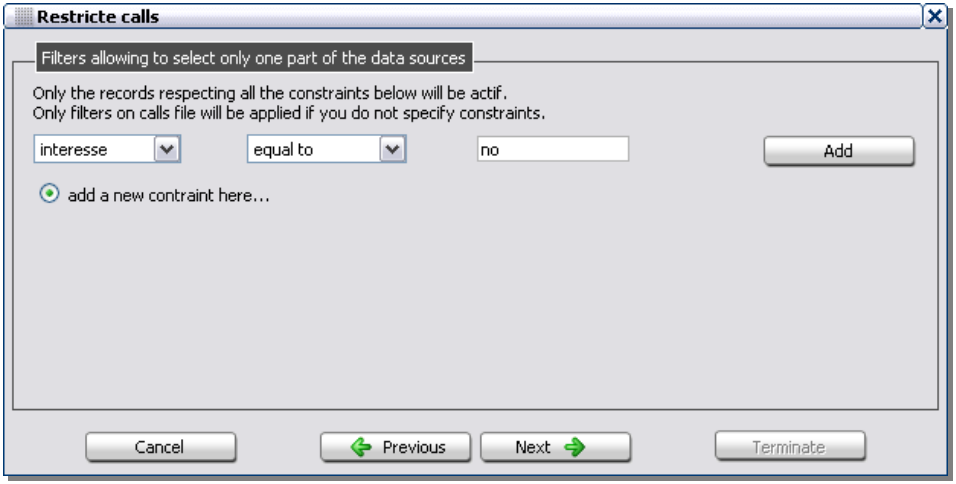
**Parameters**: to indicate the conditions to be used are defined at the level of the client file.

**For date**: this condition lets you select only those calls before a certain date or interval of dates. By selecting one of the values suggested in the list, you can select one or more dates from a calendar accessible through the button.




**For agent**: this list lets you select a particular agent.

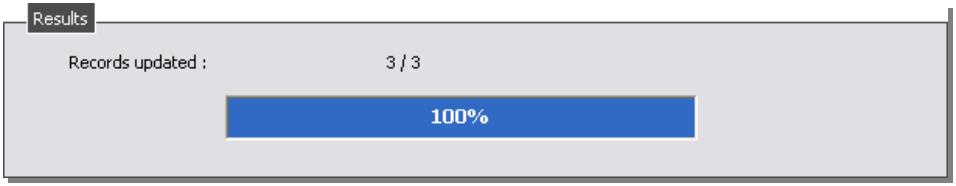
Click on Next to go to the next phase.


Restricte calls
Filters allowing to select only one part of the data sources
Only the records respecting all the constraints below will be actif.
Only filters on calls file will be applied if you do not specify constraints.
interesse
equal to
no
Add
add a new contraint here...
Cancel
Previous
Next
Terminate

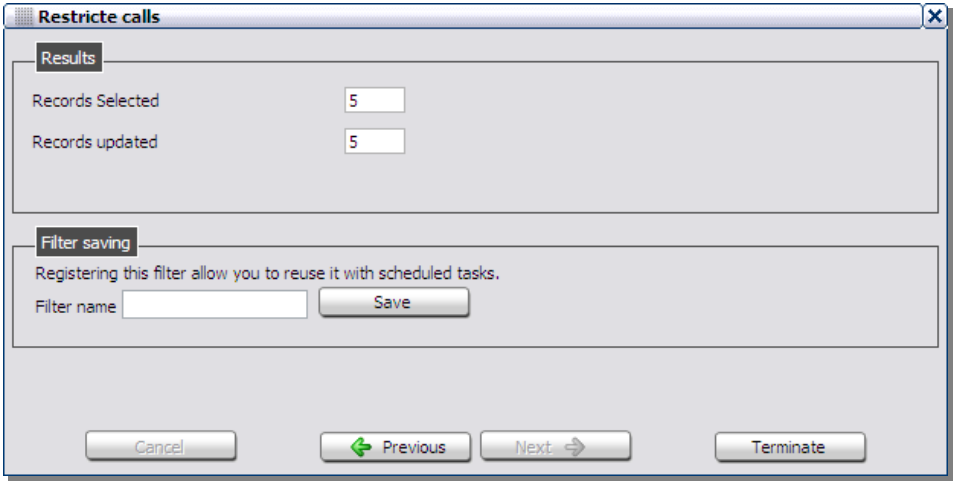
This step is only visible when the call file is linked to a customer file.

On this screen, **Filters allowing to select only one part of the data source**, lets you define a selection filter based on one or more restrictions.

A progression window appears and shows the number of modified records.




When finished, a window shows a summary of the operations.

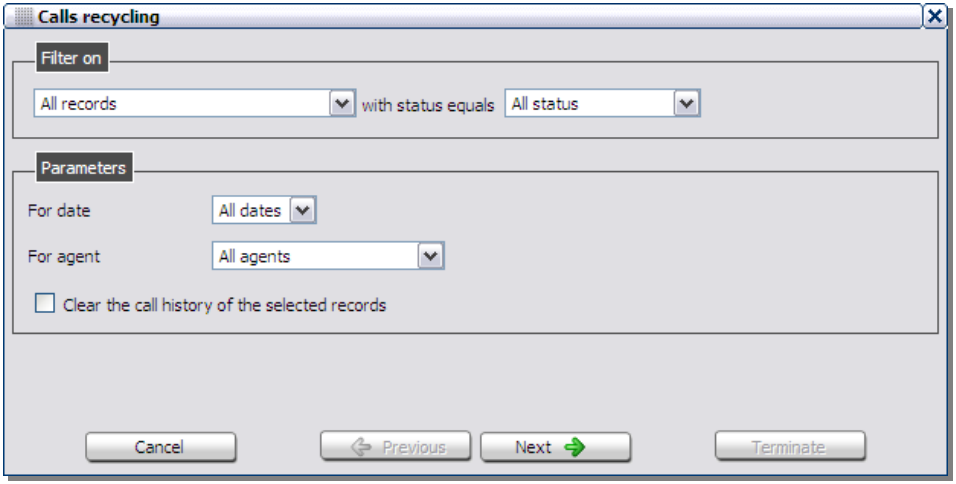



The part **Filter saving** allows to reuse the created filter into the scheduler.

Click on the button to close the window.


## Recycle

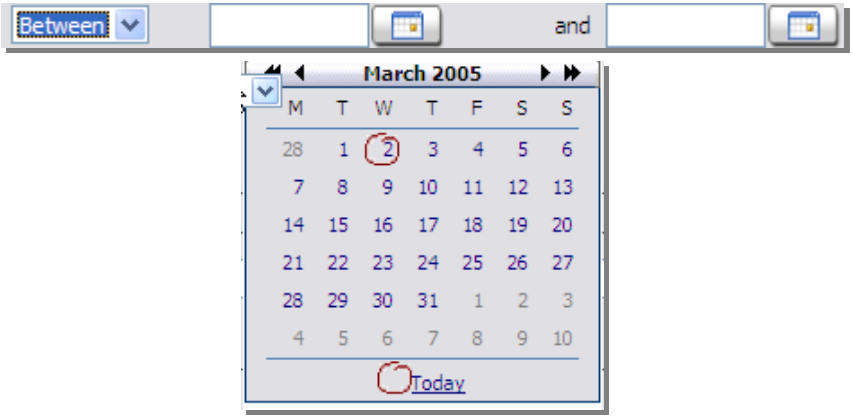
This window is used to restore certain records of the call file to their original status (before handling by the agent), thanks to a filter based on call type, date and the agent assigned to them.



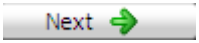

**Filter on**: the list suggest selecting « all records », or « all records except recalls and callbacks » or « recalls and callbacks ». The filter indicates the call type(s) and result to be recycled.

**Parameters**: to indicate the conditions to be used are defined at the level of the client file.

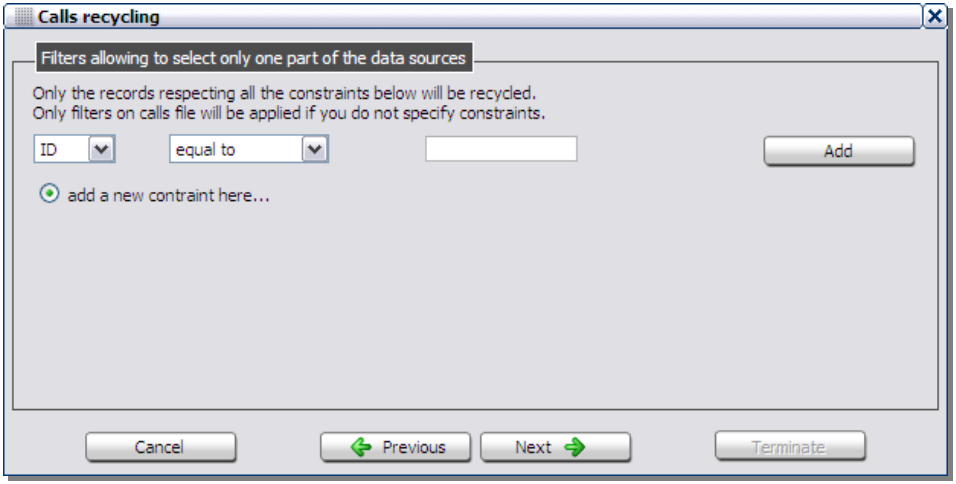
**For date**: this condition lets you select only those calls before a certain date or interval of dates. By selecting one of the values suggested in the list, you can select one or more dates from a calendar accessible through the button.




**For agent**: this list lets you select a particular agent.

Click on  to go to the next phase.

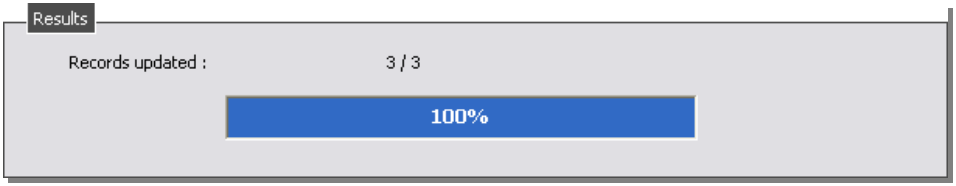



Calls recycling
Filters allowing to select only one part of the data sources
Only the records respecting all the constraints below will be recycled.
Only filters on calls file will be applied if you do not specify constraints.
ID
equal to
Add
add a new contraint here...
Cancel
Previous
Next
Terminate

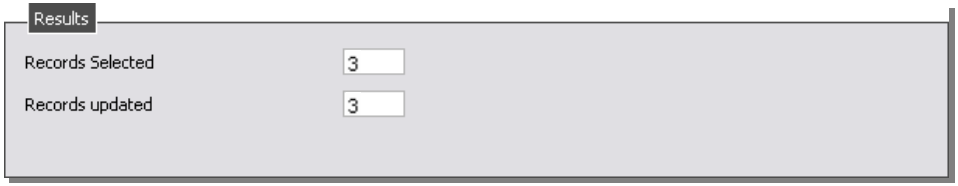
This step is only visible when the call file is linked to a customer file.

On this screen, **Filters allowing to select only one part of the data source**, lets you define a selection filter based on one or more restrictions.

A progression window appears and shows the number of modified records.



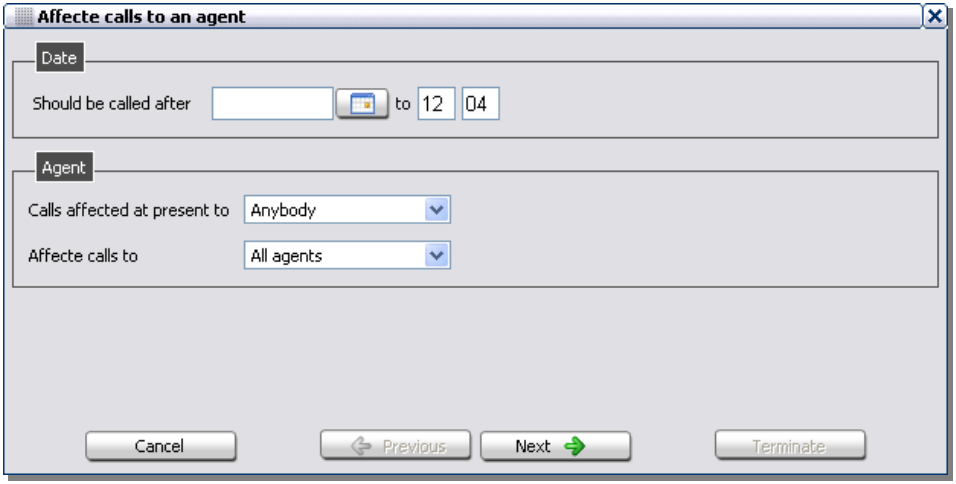

When finished, a window shows a summary of the operations.



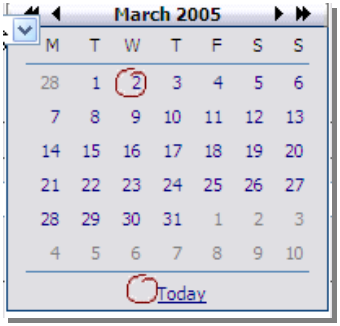

Click on the button to close the window.

## Affectation

This window allows you to assign certain records of the call file table to specific agents by transferring them to that agent or by applying a filter. You can also specify a call hour for each record.

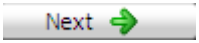



**Should be called after**: to define a precise timing to make the selected calls. By clicking the button a calendar is displayed, allowing you to select the date after which the call must be executed.

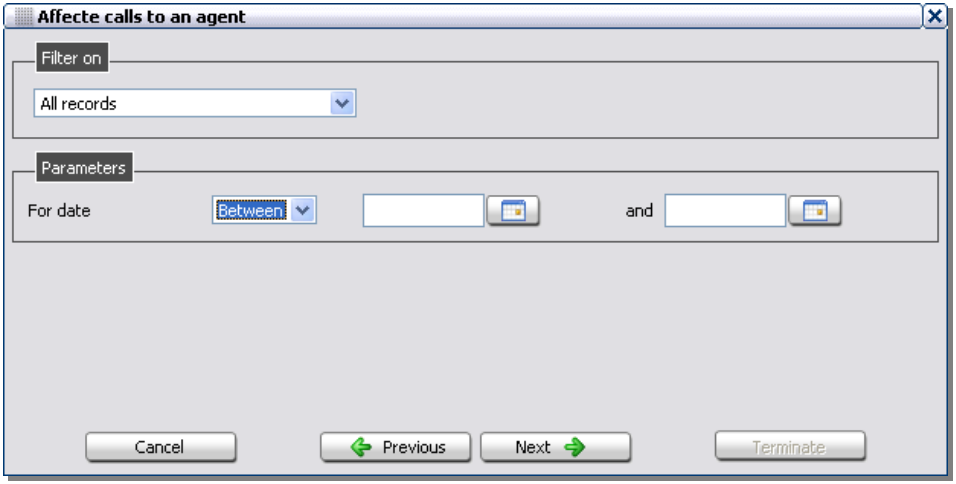



**Calls affected at present to**: allows you to select an agent to whom the records are now assigned.

**Affect calls to**: to indicate the agent to whom the selected records will be assigned.

Click on 

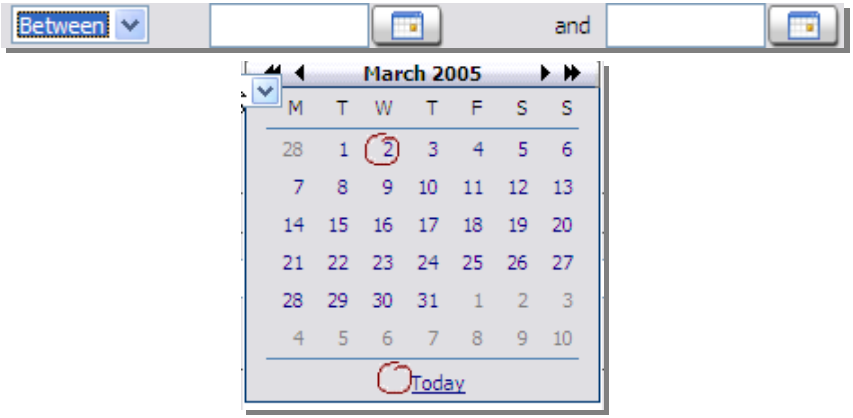
to go to the next phase.



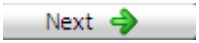

**Filter on**: the list suggests selecting « all records », or « all records except recalls and callbacks » or « recalls and callbacks ». The filter indicates the call type(s) to be affected.

**Parameters**: to indicate the conditions to be used are defined at the level of the client file.

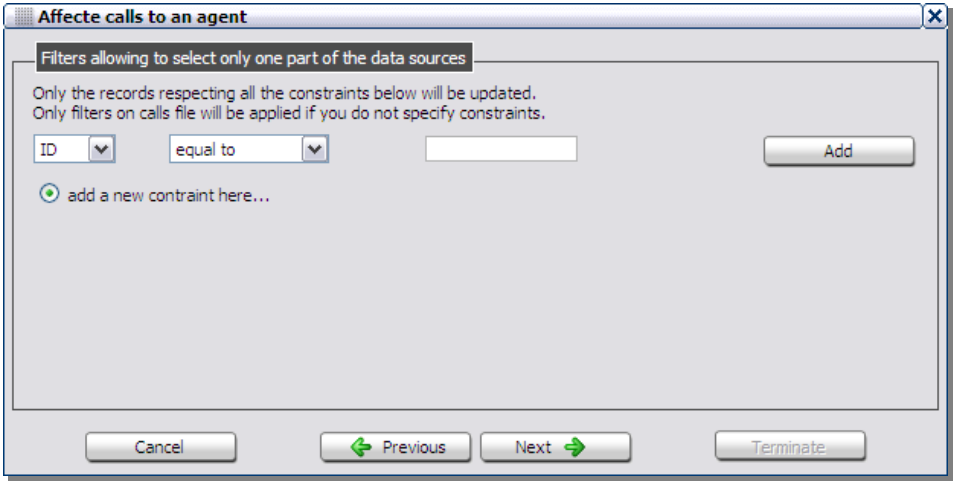
**For date**: this condition lets you select only those calls before a certain date or interval of dates. By selecting one of the values suggested in the list, you can select one or more dates from a calendar accessible through the button.



**For agent**: this list lets you select a particular agent.

Click on 

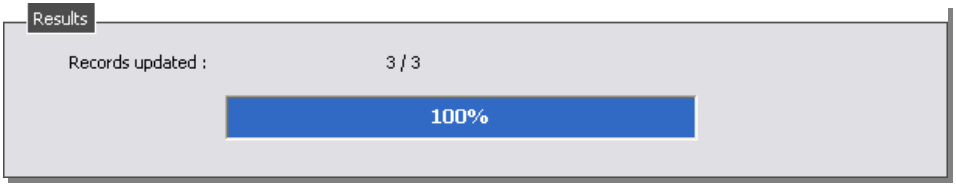
to go to the next phase.


Affecte calls to an agent
Filters allowing to select only one part of the data sources
Only the records respecting all the constraints below will be updated.
Only filters on calls file will be applied if you do not specify constraints.
ID
equal to
Add
add a new contraint here...
Cancel
Previous
Next
Terminate

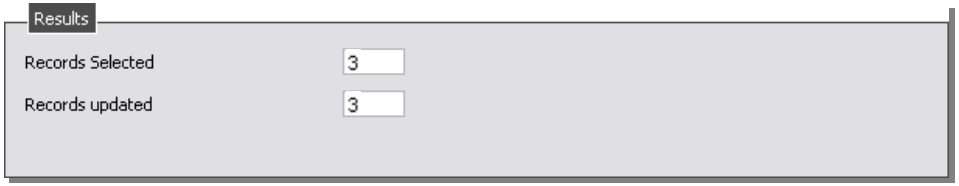
This step is only visible when the call file is linked to a customer file.

On this screen, **Filters allowing to select only one part of the data source**, lets you define a selection filter based on one or more restrictions.

A progression window appears and shows the number of modified records.




When finished, a window shows a summary of the operations.

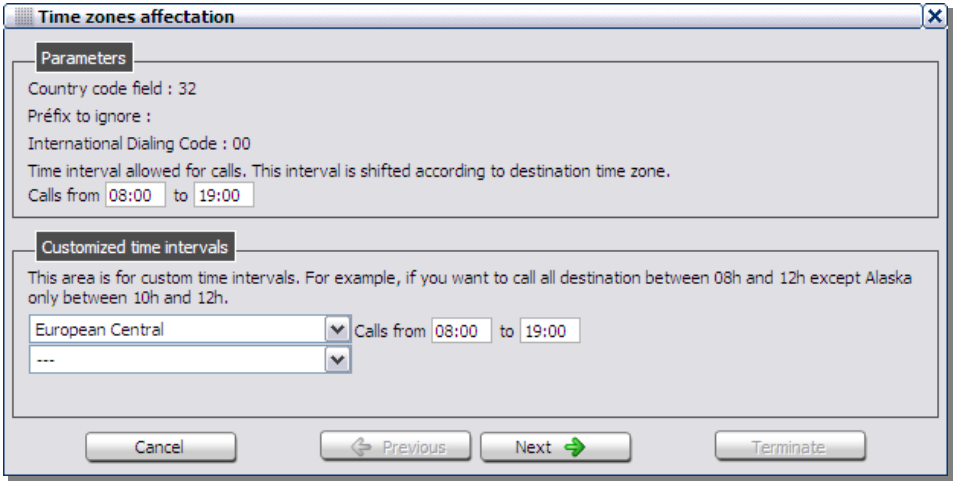



Click on the

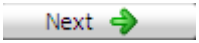
button to close the window.

## Time zones

This window first allows viewing the country parameters. They have been set during the installation. This window allows afterwards indicating the time interval allowed for the calls generated by the system according to the time zone.

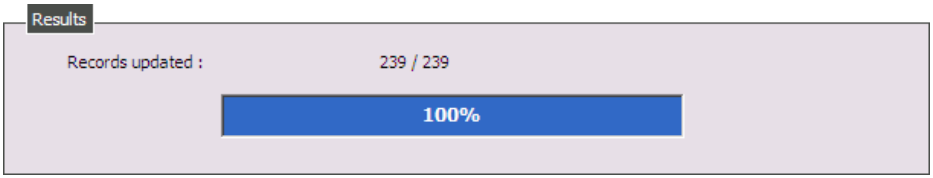

Time zones affectation
Parameters
Country code field : 32
Préfix to ignore :
International Dialing Code : 00
Time interval allowed for calls. This interval is shifted according to destination time zone.
Calls from 08:00 to 19:00
Customized time intervals
This area is for custom time intervals. For example, if you want to call all destination between 08h and 12h except Alaska only between 10h and 12h.
European Central
Calls from 08:00 to 19:00
---
Cancel
Previous
Next
Terminate

The second part of the screen allows adding specific time interval assigned to destination calls geographic areas.

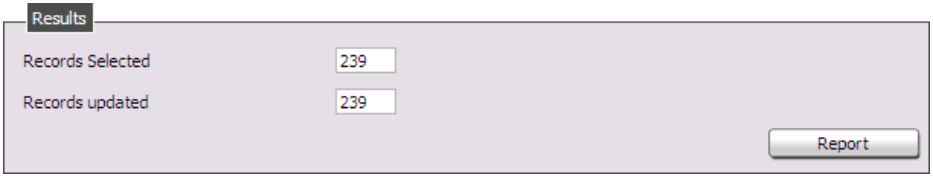
Click on 

to go to the next phase.

A progression window appears and shows the number of modified records.

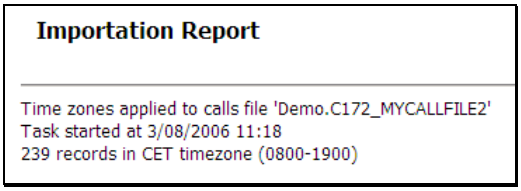



When finished, a window shows a summary of the operations.




Click on the Terminate button to close the window.

The Report button can be used to generate an update report. That allows keeping trace of performed operations and results (updated table, date, time, updated records number).


Importation Report
Time zones applied to calls file 'Demo.C172_MYCALLFILE2'
Task started at 3/08/2006 11:18
239 records in CET timezone (0800-1900)

## DISTRIBUTION RULES

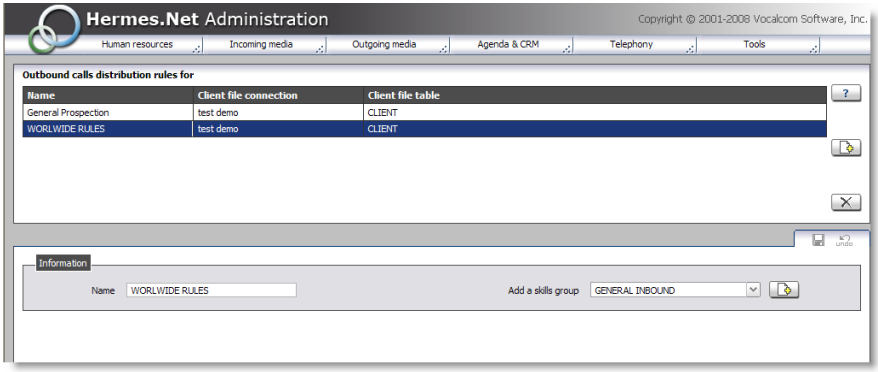
This window allows creating call routing profiles in order to “index” and “split” the callfile without having to create multiple campaigns to segment the database. The distribution rules can only be created once you’ve created “skill groups” (see Human resources).

### 8.2.4 CREATING/DELETING DISTRIBUTION RULES

Press or to create or delete a “distribution rules group”.

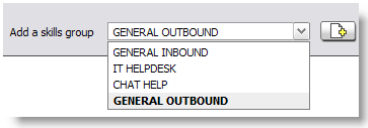
You'll need to type in a name and select a "Client file" on which these rules will be applied.

Following window appears when the "Rules" are created.



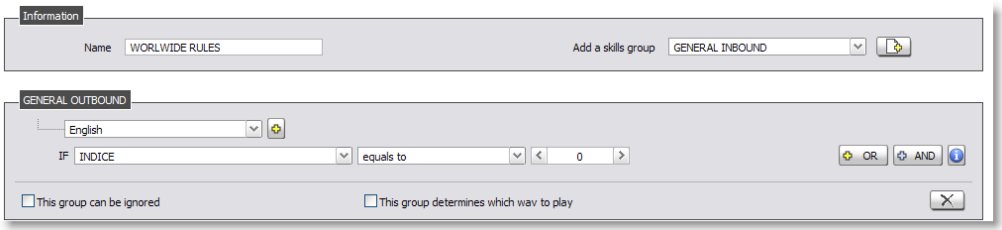

## 8.2.5 ADD A SKILL GROUP

Skill groups are created in "Human resources/Agent Skills.



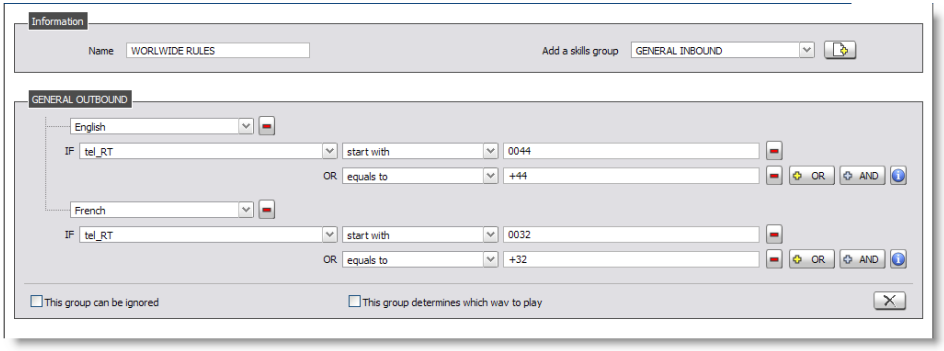

Choose the skill group you wish to apply the rules for and press .

Following screen will appear:



### 8.2.6 SETUP DISTIBUTION RULES

In the “General outbound” part of the window, the filters used to create rules are the ones created in the skill group (Human resources/Agent skills). In the example below our skill group filters the language based on the international code found in the “Telephone” column of the callfile. We create **rules** by creating **conditions**. As shown below, **IF** the number recognised in the callfile **begins with** 0044 or +44, this number will be identified as skill “**English**”. **IF** the number recognised in the callfile **begins with** 0032 or +32, this number will be identified as skill “**French**”.

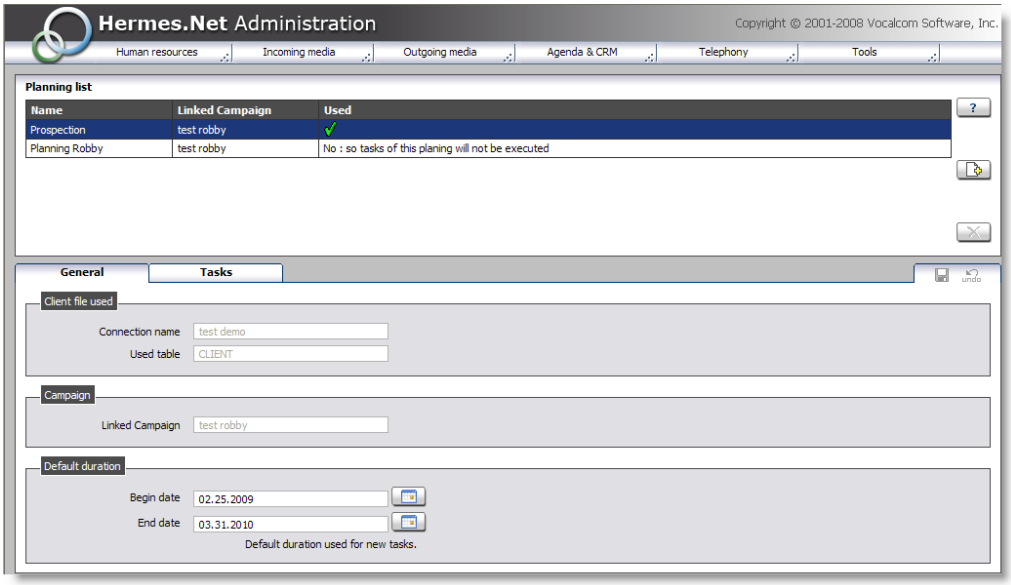



**This group can be ignored:** used to temporarily disable a set of rules.
**This group determines which wav to play:** allows choosing generic .wav files.

# QUERY SCHEDULER

The "**Query scheduler**" is used to schedule the calling of the different "**filters/restrictions**" created in the menu "Outgoing Media/Callfile. The administrator must first create a "**Restriction**" on the callfile before creating "**Filters**" on the callfile for which the **query scheduling** is required.

You'll find the created "**Query schedules**" in the "**Planning list**" window (top of the screen). Each planning is composed of tasks. Each task is a filter that will be applied on the callfile in order to be executed at a specific date/time.




**Name:** identifies the name of the planning.

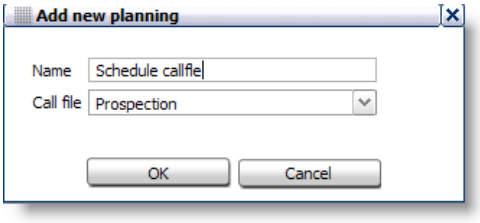
**Linked Campaign:** indicates the campaign for which the scheduling is required.

**Used** indicates if the planning is already selected on campaign level. If it's not selected, the next error message will be displayed :

Use the and buttons, on the right side of the screen, to add or delete plannings.

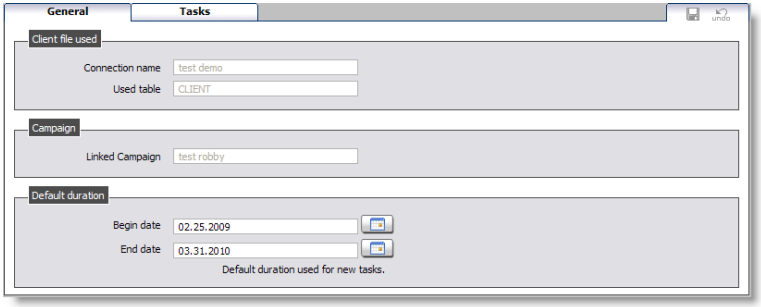
### 8.2.7 Creating a Planning

Click on the button to create a new planning:



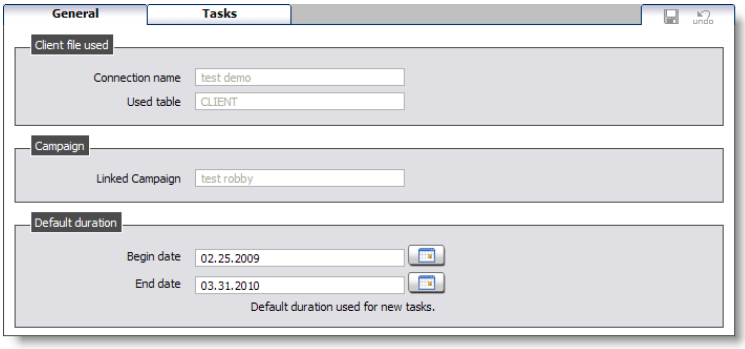

You'll need to choose a name for the planning and select the call file to be used for applying the filters. By default the planning is created empty. The next step consists of adding tasks.

Two tabs are used to configure this "Query scheduler": **General** and **Tasks**:




## General Tab

You'll find on this tab general information about the selected planning.




**Connection Name:** identifies database used for the scheduling.

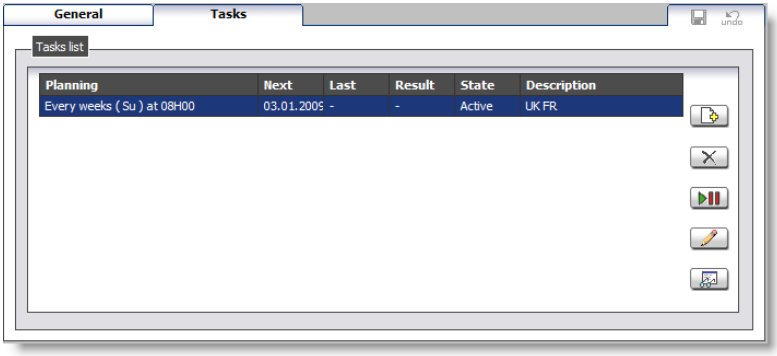
**Used table:** identifies the callfile used for the scheduling task.

**Linked Campaign:** indicates the campaign which is linked to the planning.

**Default duration**: these fields indicate the period of activity of the planning.

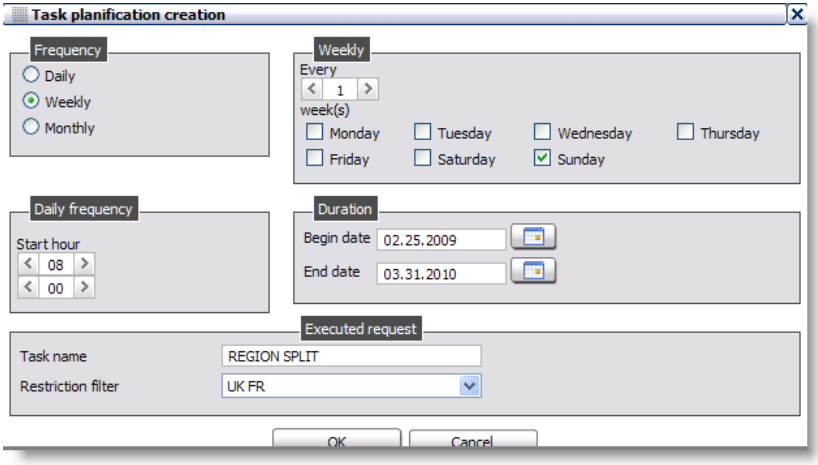
## Tasks Tab

This tab shows the list of tasks (filters) included in the planning.




Use the and buttons on the right side of the Task list to create or delete tasks.

Click on to open the next dialog window:




First select the frequency type between **Daily**, **Weekly** and **Monthly**. According to the selected type, the frequency must be defined: every x day(s), every x week(s), or which day of which month(s).

Afterwards select the time of the task execution, and the begin and end dates.

Enter a **Task name** in the field, and select one of the calls file filters proposed into the list.

Click on the

button to validate. The new task is now displayed into the list with the next information:

**Planning**: reminder of the selected frequency

**Next**: date of the next execution according to the frequency

**Last**: date of the last execution

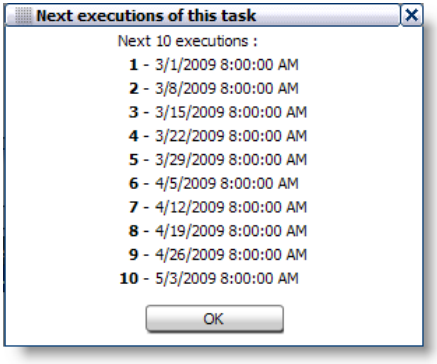
**Result**: result of the last execution

**State**: Active (the task will be executed according to the frequency) or inactive (the task won't be executed, even if the frequency foresee future executions)

**Description**: description of the task

Use the button to remove the selected task. Use the button to activate or deactivate a task. Its status is displayed in the list in the column **State**. Use the button to edit an existing task.

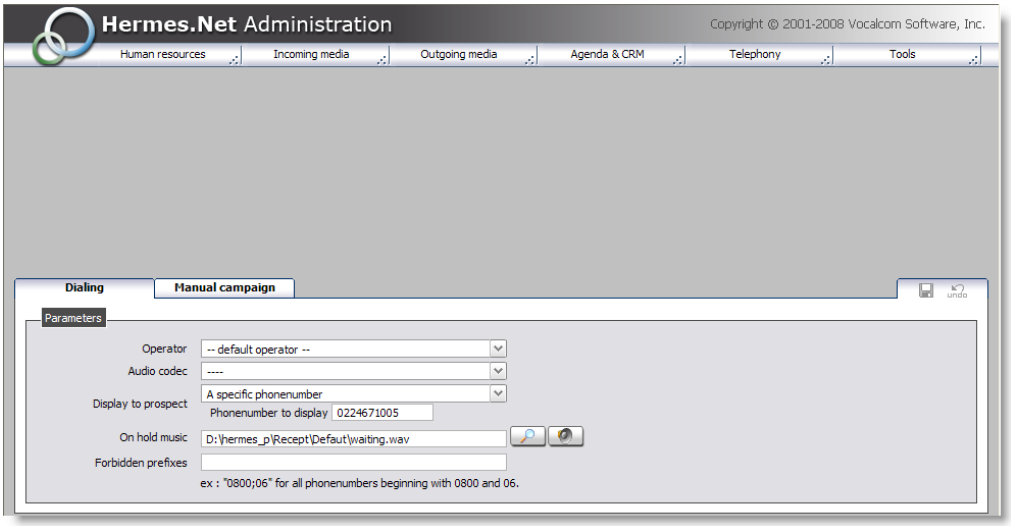
Use the button to see the future executions time list:




This can be useful to check if the scheduler settings are correct, and to quickly check the next "execution time" of a task.

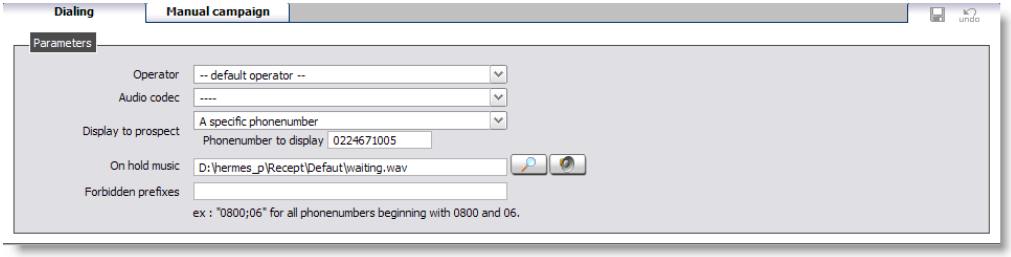
## OUTBOUND CALLS (Manual campaign)

This menu allows creating “Manual calls campaigns”. The purpose is to standardize all outgoing generated calls using the vocalcom system.




Different tabs are available to set up the manual call mode: **Dialing** and **Manual campaign**

## Dialing tab




**Operator:** allows choosing the network operator for the manual outgoing call.

**Audio codec:** is used only for “Voip” (Voice over IP) telephony architecture.

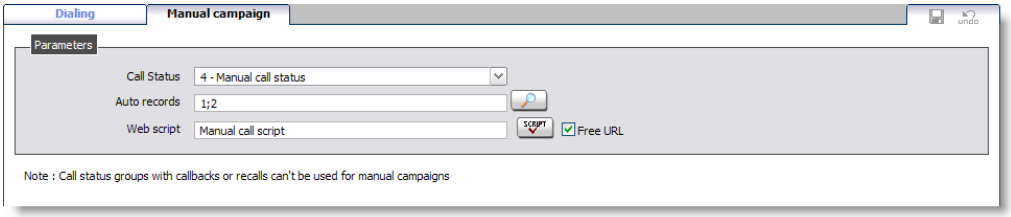
**Display to prospect:** used to choose the outgoing number that is displayed to the prospect.

**On hold music:** allows selecting the “on hold” music when customer is put on hold.

**Forbidden prefixes:** will restrict the outgoing calls to certain prefixes for example.

These manual call settings activate every time a manual call is generated using the ACD.

## Manual campaign tab



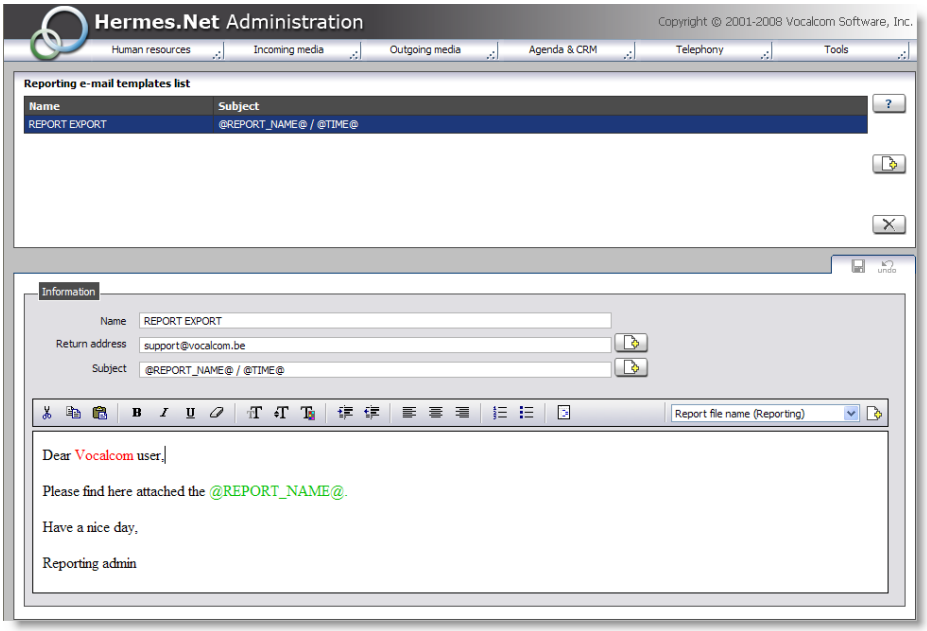

**Call Status**: to select from the call status sets defined on the system.

**Auto record:** allows recording manual calls generated using vocalcom.

**Web Script**: to select a script to be used for all manual calls.

## 8.3 OUTBOUND EMAILS

This menu is used to create an email template used to attach reports that are automatically sent using the reporting tool.




Use and to create or delete a template.

The following system variable can be used to display:

“Report name” (=@REPORT_NAME@)

or

“Execution date” of the report (=@TIME@)

## 8.4 CALL STATUS

This option will re-direct to the “**Call Status**” menu. See page 126 for more information.

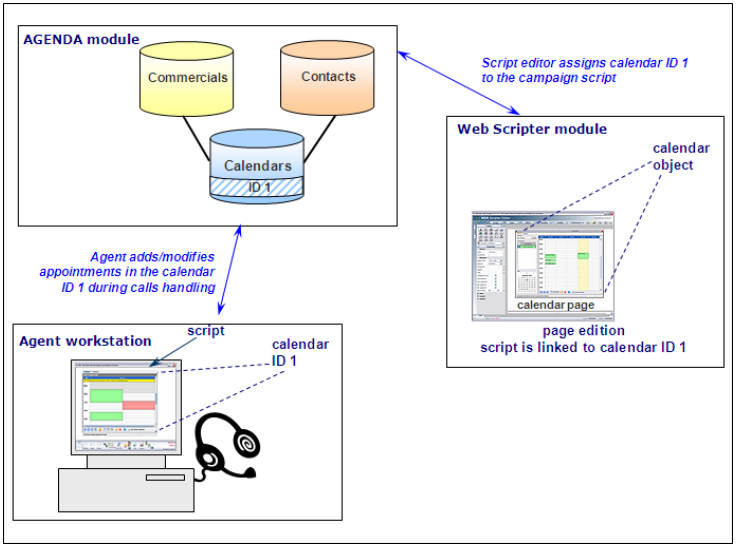
## AGENDA & CRM

The agenda & CRM module are used for campaigns on which appointments need to be taken by agents for commercial people.

The agenda is actually an object of the script displayed on the agent's workstation. This calendar allows taking appointments that are stored on a webserver and which the commercial can remotely access using an ID and Passwor.

**Calendar**: the object integrated into a script, used to show a calendar with its commercials and contacts.

**Script**: the web script written with the Web Scripter module that runs on the agents workstations during calls handling. A page into this script contains the **Calendar** object.



## CREATE AND RUN AN APPOINTMENT SCRIPT USING THE CALENDAR

9.1 Planning management, Salesman, Contacts

9.2 Script creation and setting

9.3 How to use the calendar during call handling

9.4 Specific agenda parameters

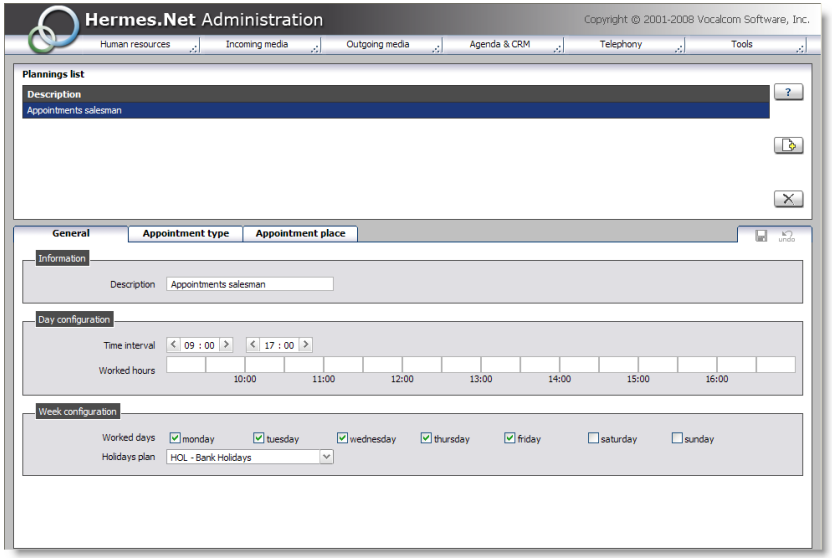
9.5 Planning Consultation

## 9.1 PLANNING (AGENDA) CREATION

The first step is the creation of a planning (Agenda). Afterwards this planning will be associated to commercials and contacts.

### Planning management

Use the and buttons to add or delete plannings.
The **Calendar** created here will be used to do relationship managment between commercials, contacts and agents.
A commercial can use several calendars, and a calendar can concern several commercials.
The calendar is afterwards assigned to a calendar **object** into a script.

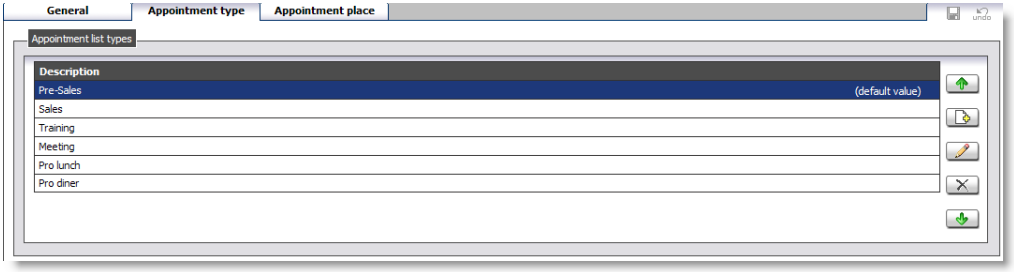


The planning is configured using the 3 following tabs: General, Appointment types, Appointment location.

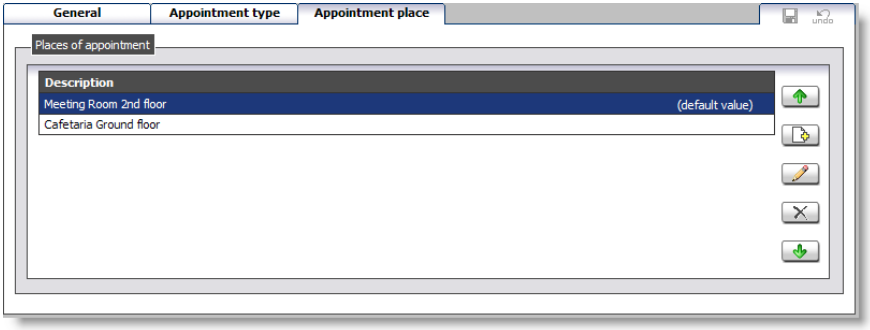
In the **General** tab, you can set a name and description of calendar. You can also define the calendar period with a start and end date, and the commercials activity hours with the start and end time. A holiday planning (Human ressources/Holiday plan) can also be used.

Use the icon in the right upper corner to validate changes.

The **Appointment type** tab allows creating appointment subjects used by the agents when taking appointments. Use the and buttons to add or delete appointments. Use the button to edit an existing appointment type.




The **Appointment place** is used to create predefined locations that will be added to the appointment type. Use the and buttons to add or delete appointments. Use the button to edit an existing appointment type.

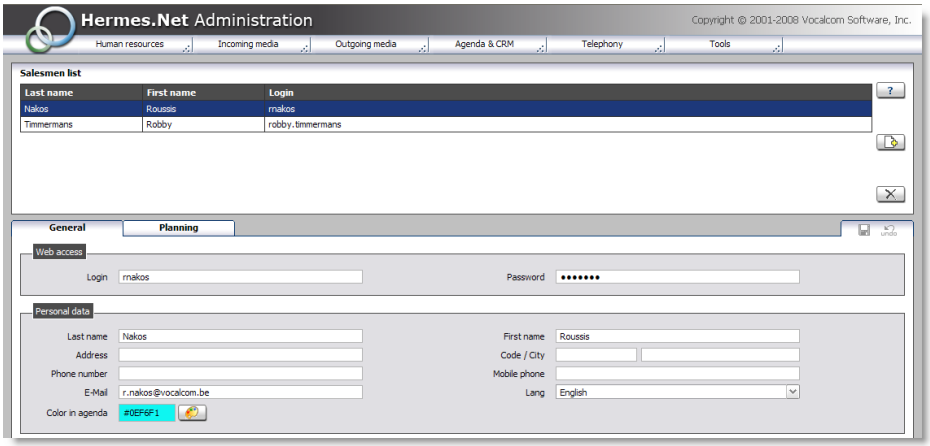



## 9.2 SALESMEN CONFIGURATION

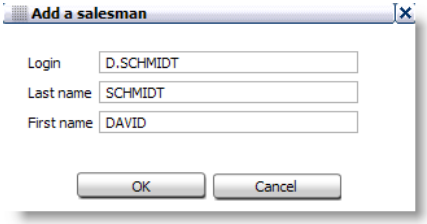
This menu is used to create **Salesmen** destined to be attached to one or several plannings.

Two tabs are used to configure the salesman: GENERAL & PLANNING

### GENERAL tab




Use the and buttons to add or delete Salesmen.




The login field is the salesman web access ID.

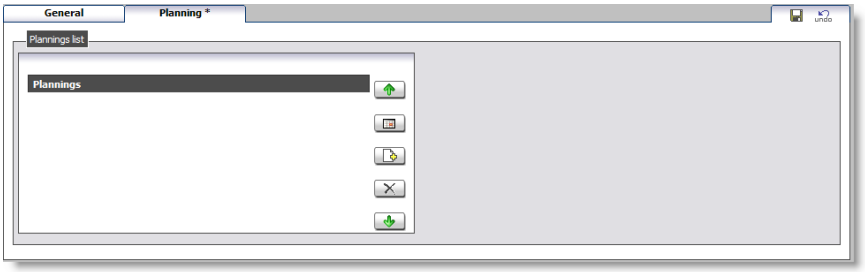
The "**Web access**" area of the General tab allows changing the salesman ID and choosing a password that will be used together with the ID to consult the appointments.

The "**Personal data**" area is used to register some more information about the salesman.

The "Color in agenda" option makes it easier for the agent to identify on which planning he's working at the moment.

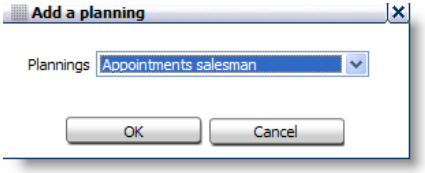
## PLANNING TAB

Is used for the "**affectation**" of the salesman to a certain planning and also to setup the "**regions**" for which the salesman will be responsible for. This info is stored in the database together with the data saved on the General tab.



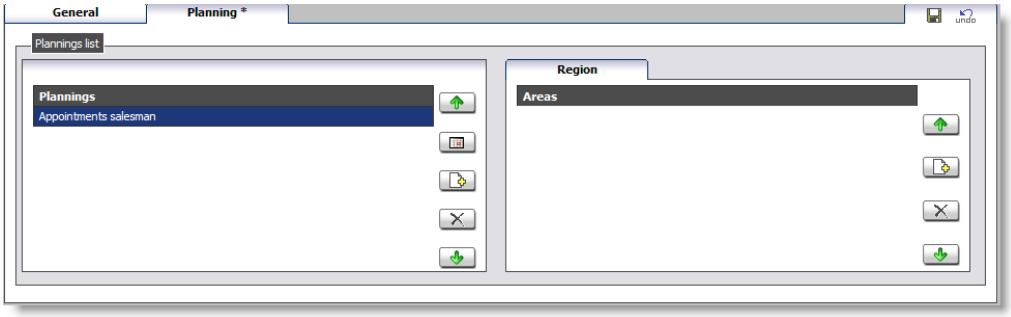

Use the and buttons to add or delete the affectation to a planning.

When adding a planning simply choose the planning you want to affect to the salesman.

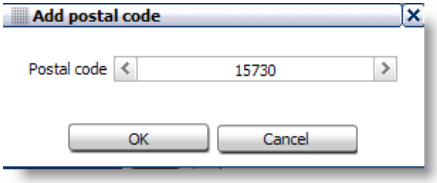


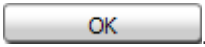

Once the affectation to a planning is validated, an new area will appear: “**REGION**”

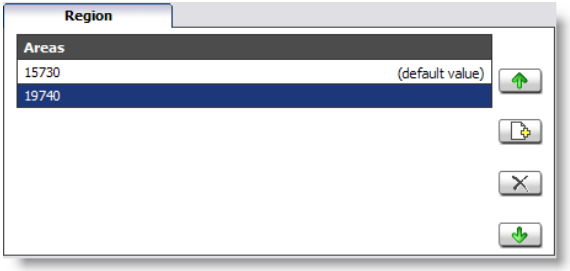
It allows creating “Regions” using zip codes which will be linked to the planning and the salesman.




Use the and buttons of the “Region” area to add or delete a region.

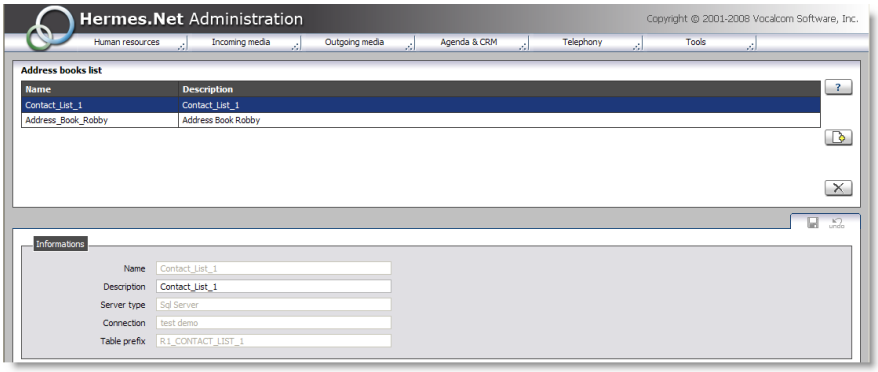



Type in the Postal code you want to create and press  . The first region created becomes the “Default region value”.

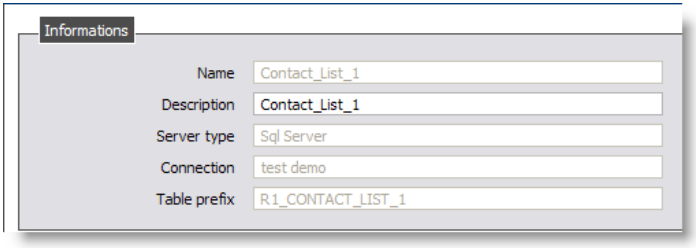



## 9.3 ADDRESS BOOK

The Address Book is database table used for taking appointments as well as for the registering new customers in the CRM (Customer relationship management) found on Inbound or outbound campaigns.
Every inbound or outbound campaign can use a different “Address book”.




Use the and buttons to add or delete an “Address book”. This address book is then linked to a campaign (inbound or outbound) and will be visible on the agent’s workstation when the CRM option is used.




**Name**: name of the address book

**Description**: detailed name of address book

**Server type**: indicates the type of database server used (SQL, Oracle)

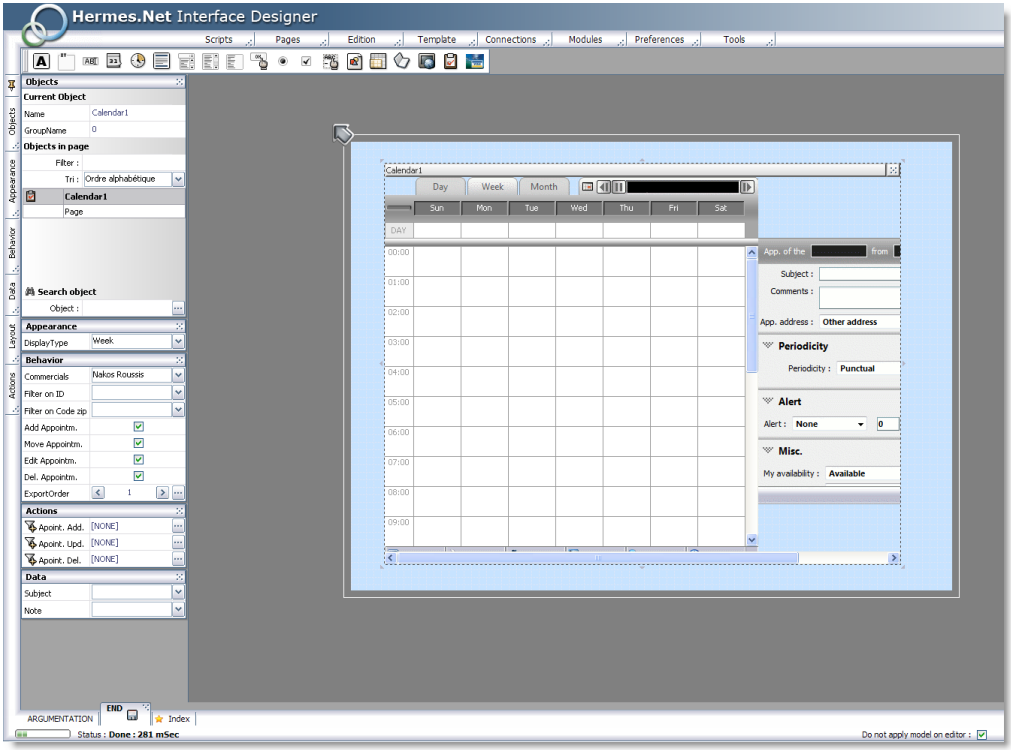
**Connection** : corresponds to the database used in the server

**Table prefix**: indicates the real vocalcom internal name of the address book.

## 9.4 SCRIPT CREATION AND SETTINGS

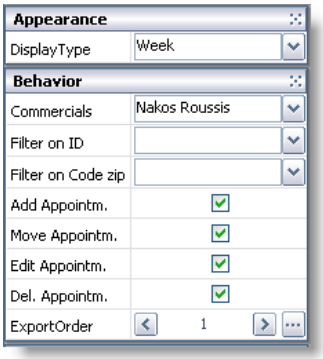
All the data registered using the **Planning** module are afterwards diplayed to the agents on the Calendar object into a script.

This chapter describes how to integrate the agenda object in a script. It requires to




Select the page and add a **Calendar** object using the button in the toolbox. The new calendar will take place in the middle of the page.

Select this object to see calendar properties. In the **Appearance** and **Behavior** category, the next properties are proposed :

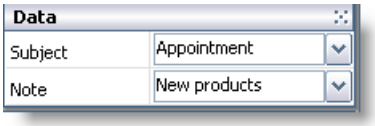



**Display Type**: defines the default display type of the Agenda object (by week, work week only or current day).

**Commercials**: Name of the commercial (Last name 'case sensitive') selected by default when the Agenda is opened. It can be a literal or a global variable.

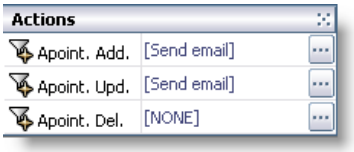
The check boxes proposed can be used to limit the agents action on the agenda used.

In the **Data** category, the next properties are proposed:




**Subject** and **Note**: Default values that are automatically set when an appointment is created. The agent can modify these fields if necessary.

In the **Action** category, you can assign actions to calendar events:




The **Calendar** object generates the next events:

Adding of appointment (Apoint. Add.)
Update of appointment (Apoint. Upd.)
Suppression of appointment (Apoint. Del.)

Once all the parameters and properties set, just save the script and generate it.
Link it to the right campaign and set agents skills to handle calls of this campaign.

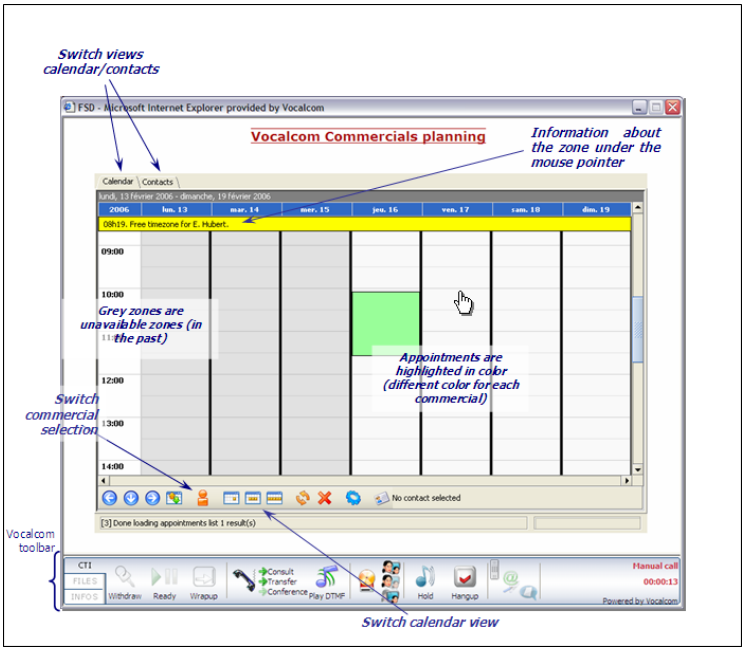
## STEP 3 : HOW TO USE THE CALENDAR DURING CALL HANDLING ?

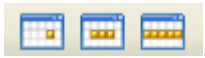
The agents use a script during calls handling.

On one page of the script, The **Calendar** object has been placed on a script page.

Calendar description

The agent must first go to the page containing the calendar and the next object appears:

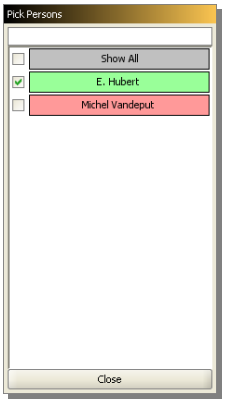

Switch views calendar/contacts
FSD - Microsoft Internet Explorer provided by Vocalcom
Vocalcom Commercials planning
Information about the zone under the mouse pointer
Calendar
Contacts
08h19. Free timezone for E. Hubert.
Grey zones are unavailable zones (in the past)
Appointments are highlighted in color (different color for each commercial)
Switch commercial selection
No contact selected
Vocalcom toolbar
Switch calendar view

By default, the calendar view is the one selected by the script editor, but it can be changed using buttons  .

The buttons in the lower toolbar allows navigating (previous, today or next day).

The button can be used to pick up a specific date into a calendar pop-up.

The button can be used to select the available commercials.




Check the box **Show All** to see all the commercials plannings into the agenda. In this case, the day columns are divided and the meetings are shown with different colors.
The related colors are visible here (E. Hubert is highlighted in green, M. Vandeput is highlighted in red).

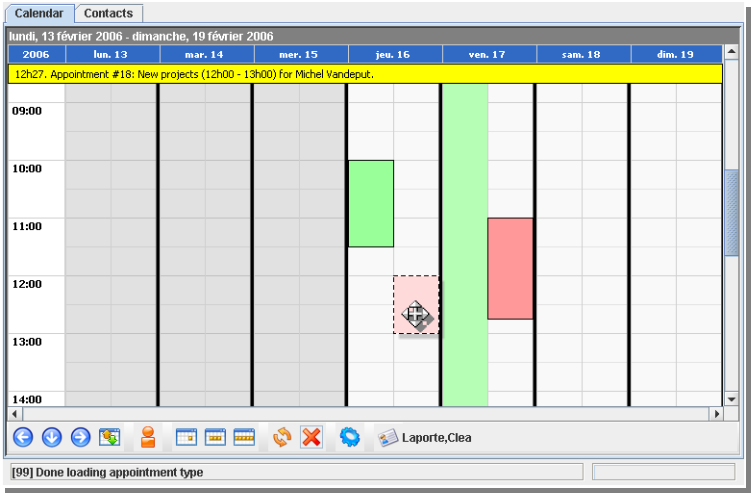
Check the box in front of the name of the commercial you want to see. Click the **Close** button to close this pop-up.

**Remark**

It is possible to select a default commercial via the Web scripter application.

This example shows 2 commercials plannings on the same agenda. The meetings are set in different colors for each commercial.

Unavailability periods are also highlighted (Friday 17 is closed for commercial Hubert).




The button can be used to refresh displayed information. (the agenda can be adapted by several users in the same time).

The button can be used to delete the selected appointment.

The button can be used by experimented users to open the debugging window. Java applet properties names and values are visible in this window.

The zone indicates the name of the selected contact.


The zones in the past is displayed in grey. It's not possible to add appointment on past zones.

The yellow line at the top of the window show at any moment information about the item under the mouse pointer.

## Appointment creation

When the agent wants to add an appointment into the commercial planning, he must first select the contact using the button in the agenda toolbar.

The **Contacts management** window opens and a contact can be selected into the list.

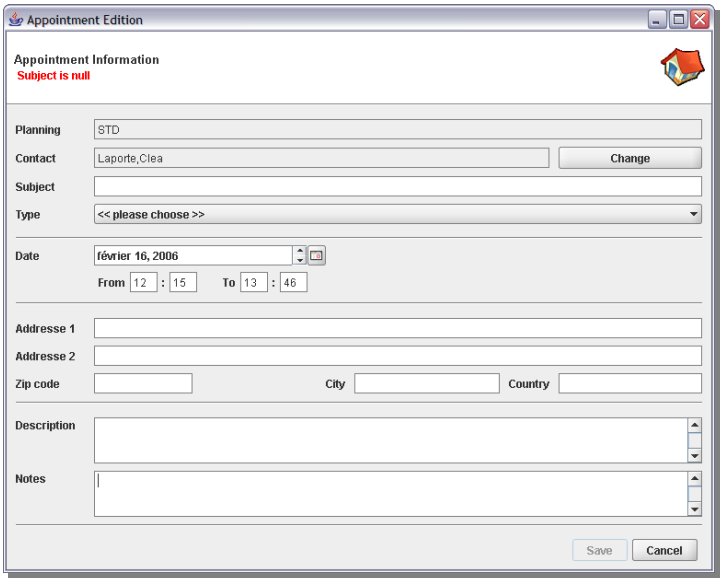
If the agent wants to create a new contact, he can click on the button **Add a new contact**.

See **Contact management** section to find details about this window.

Once the contact is selected, the agent must click on the button **Select contact** to come back to the planning view.

The name of the selected contact is now displayed in the agenda toolbar.

To create an appointment, the agent must click and select a zone into the right commercial grid. The window **Appointment Edition** opens:




Information about the selected planning and contact are displayed.

It's possible to select another contact by clicking on the **Change** button. The window **Contact Management** will open and allows searching or creating a new contact. See **Contact management** section to find details about this window.

The agent can type in subject, select the right date, start and end dates, and fill in the location of the appointment. A description and a note can be added.

The type of appointment must be selected into the list **Type**. The list of available types set into the **Planning** module is proposed.

**Remark**

Via the script edition, the subject and the note values can be set by default.

## Appointment modification

The agent can modify an existing appointment by double-clicking on it into the grid.

The window **Appointment Edition** opens.

See previous point about appointment creation.

## Appointment suppression

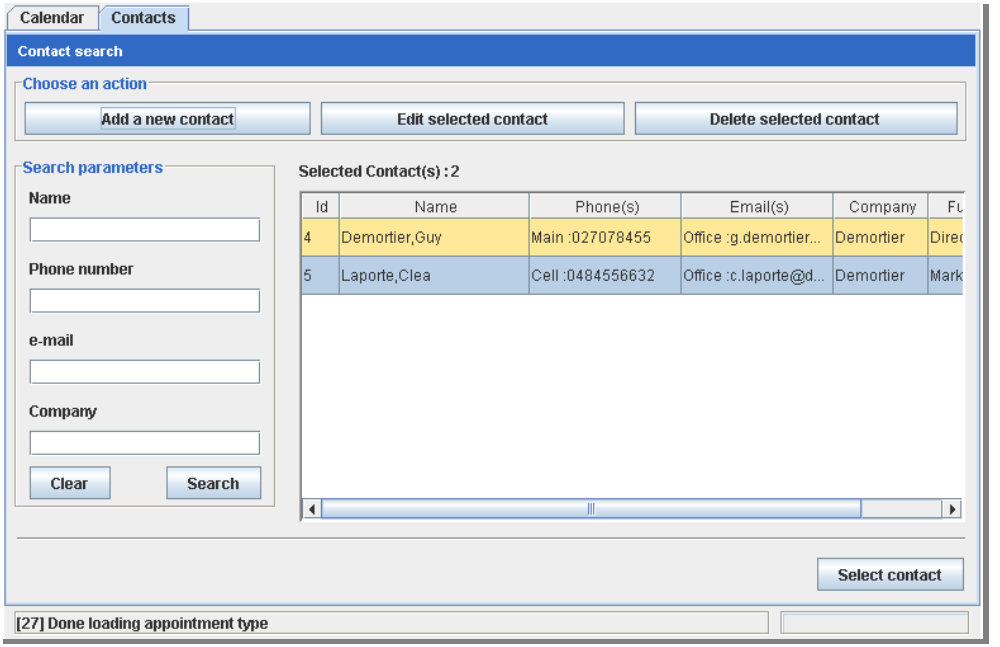
The agent must select the appointment by clicking on it. It becomes highlighted and he can suppress it using the button .

It's possible to limit the actions the agent can do on appointments using the **Calendar** object properties in the Web Scripter. See Step 2 to find details about these limitations.

## Contact Management

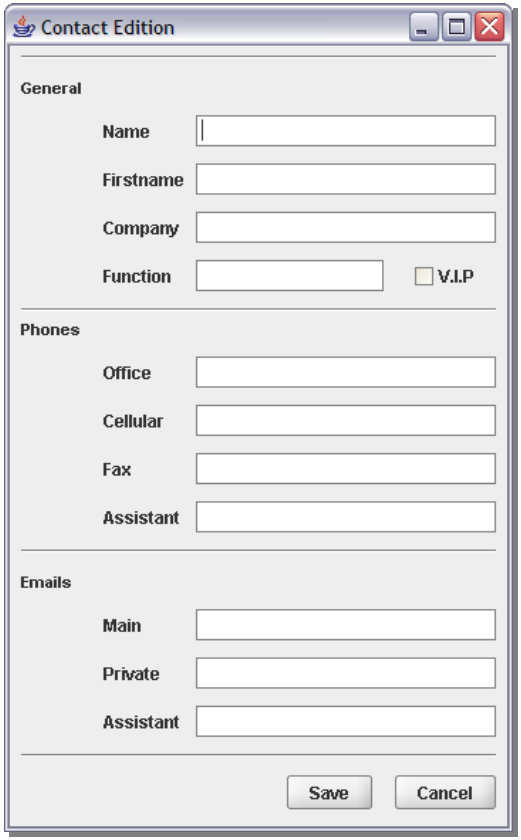
You can access the **Contact Management** window via the tab at the top of the window, or via the button

in the agenda toolbar.




If the list is empty when the window opens and you must select a contact to create an appointment, just click on the **Search** button : the list will be refreshed with all the existing contacts. Enter search parameters in the fields **Name**, **Phone number**, **e-mail** or **Company** if you want only see contacts matching to these parameters.

If the concerned contact doesn't exists yet, click on the button **Add a new contact**.
The **Contact Edition** pop-up opens :




Enter the contact information and validate it using the **Save** button.
Click on the **Cancel** button to close this pop-up and come back to the existing contacts list.

The contacts can also be added by a company administrator via the **Planning** module. See in Step 1 section details about contacts settings.

Select an existing contact and click on the button **Edit selected contact** to open the pop-up **Contact edition**.

Use the **Delete selected contact** to suppress contact.

## STEP 4 : CONFIGURE THE AGENDA OBJECT – SPECIFIC PARAMETERS

The content of this section is extracted from the technical note 3 of Hermes.Net.

**Prerequisites to use the Agenda within the Web Scripter**

The Web Agenda module into the company of the site must be set with at least one commercial, one planning, and this commercial assigned to this planning.

**How to get parameters returned by the Agenda object**

Data returned by the Agenda are included into the object it-self.

Example: the agenda name is 'Calendar0', and the returned values are accessible using the next variables names:

Appointment Information
@Calendar0.appointmentId
@Calendar0.personId
@Calendar0.contactId
@Calendar0.calendarId
@Calendar0.typeId
@Calendar0.appointmentSubject
@Calendar0.appointmentDescription
@Calendar0.appointmentBeginDate (format Hermes)
@Calendar0.appointmentEndDate (format Hermes)
@Calendar0.appointmentStartTime (format Hermes)
@Calendar0.appointmentEndTime (format Hermes)

@Calendar0.appointmentDuration
@Calendar0.appointmentWeekNumber
@Calendar0.appointmentNotes
@Calendar0.creationDate
@Calendar0.userId
@Calendar0.isDeleted (true / false)
@Calendar0.isConfirmed (true / false)
@Calendar0.isBlocked (true / false)
@Calendar0.lastModificationDate
@Calendar0.appointmentAddress1
@Calendar0.appointmentAddress2
@Calendar0.appointmentZipCode
@Calendar0.appointmentCity
@Calendar0.appointmentCountry

Contact Information
@Calendar0.contactName
@Calendar0.contactFirstname
@Calendar0.contactCompanyName
@Calendar0.contactFunction
@Calendar0.contactMobilePhoneNumber
@Calendar0.contactMainPhoneNumber
@Calendar0.contactAssistantPhoneNumber
@Calendar0.contactPersonnalEmail
@Calendar0.contactOfficeEmail
@Calendar0.contactAssistantEmail
@Calendar0.contactFaxPhoneNumber

Commercial Information
@Calendar0.personFirstName
@Calendar0.personLastName

@Calendar0.personFunction

@Calendar0.personCompanyId

@Calendar0.personWebLogin

@Calendar0.personWebPassword

@Calendar0.personWebConsultAllowed

@Calendar0.personLastModificationDate

@Calendar0.personCreationDate

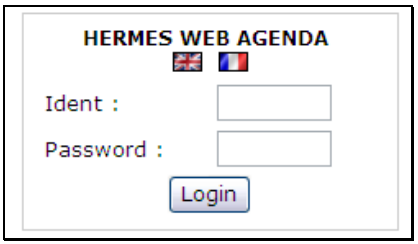
@Calendar0.personUserId

## STEP 5 : CONSULTATION OF THE PLANNING BY THE COMMERCIALS

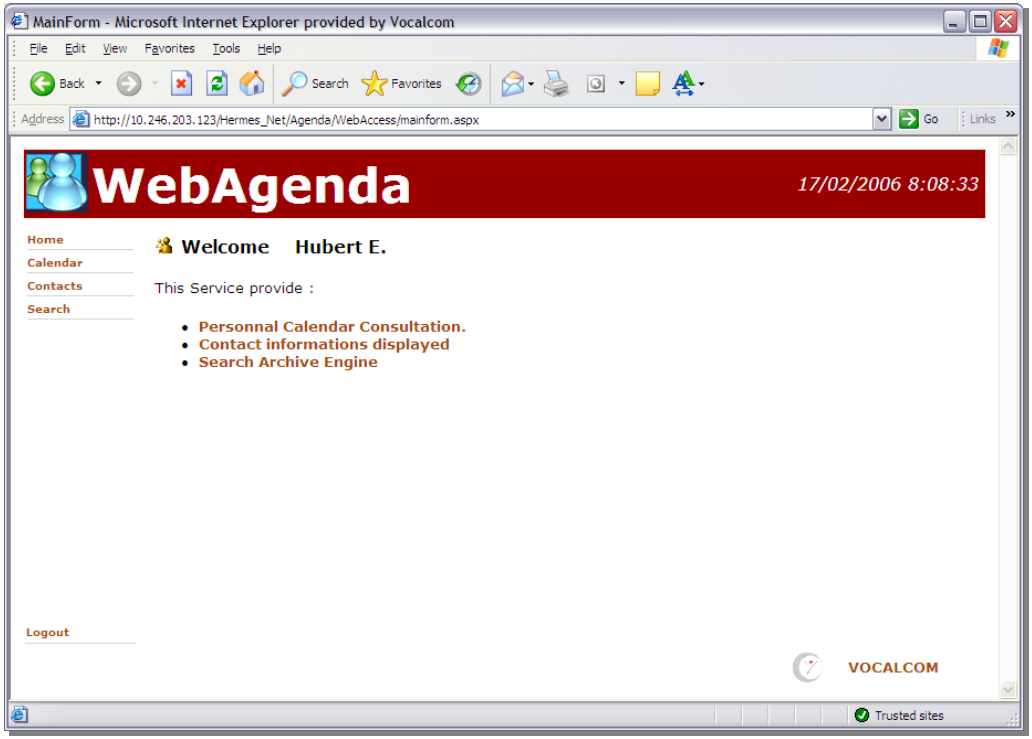
The commercials can consult their planning filled by the agents via an URL.

**http://<Hermes.Net IP address or name>/Hermes_Net/Agenda/WebAccess/login.aspx**

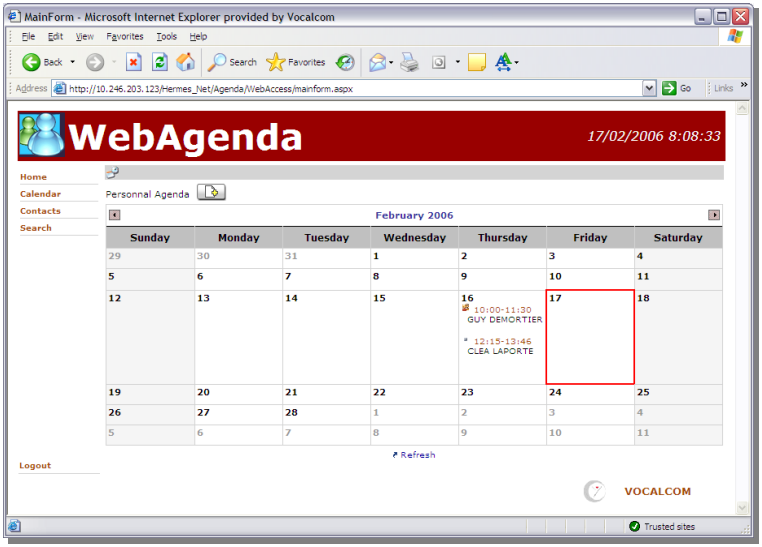
The first page is a login page where the commercial can enter using his login/password. These information were set by an administrator in the **Planning** module. See in step 1 details about this information.




The **WebAgenda** module opens :

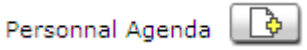



The **Welcome** screen proposes to consult the personnal planning, to consult the contacts list and contacts information, or to perform an advanced search on archived appointments.




The consultation of the planning is similar to the consultation as described in step 2. The current day is highlighted in red. Appointments are shortly described into the corresponding boxes : start/end time, name of the attendee.

If the commercial clicks on the appointment time, details are shown in a new window.

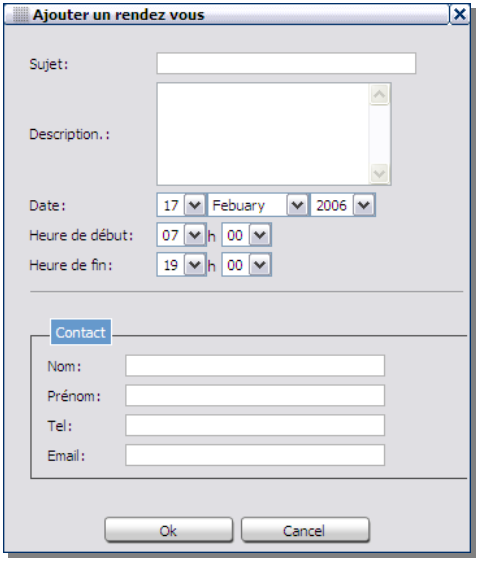
If you click on the icon 

, you will open the form **Add a new appointment**.

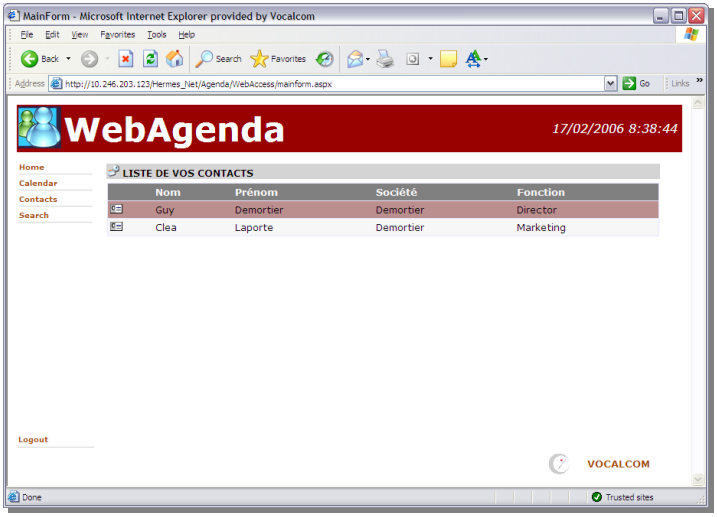
Enter a subject, a description, pick the right date and time, and type in contact details. The appointment will be added into your calendar.

**Remark**

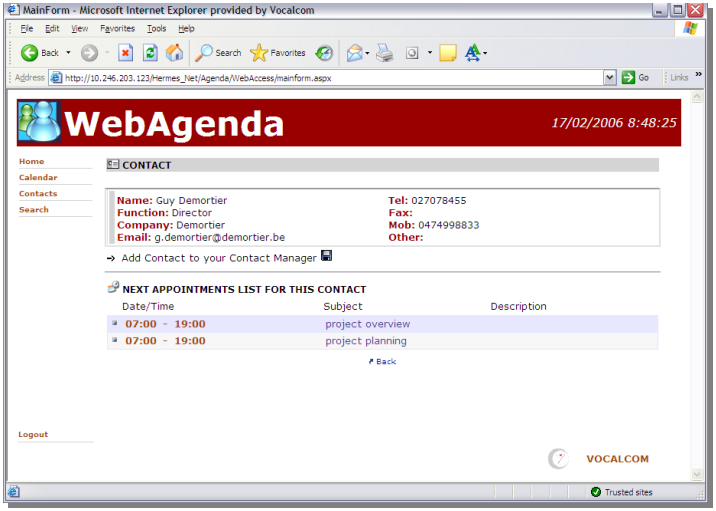
These personnal appointments are only visible in this window. They won't be visible in the agent's window or in the **Planning** module opened by the administrator.

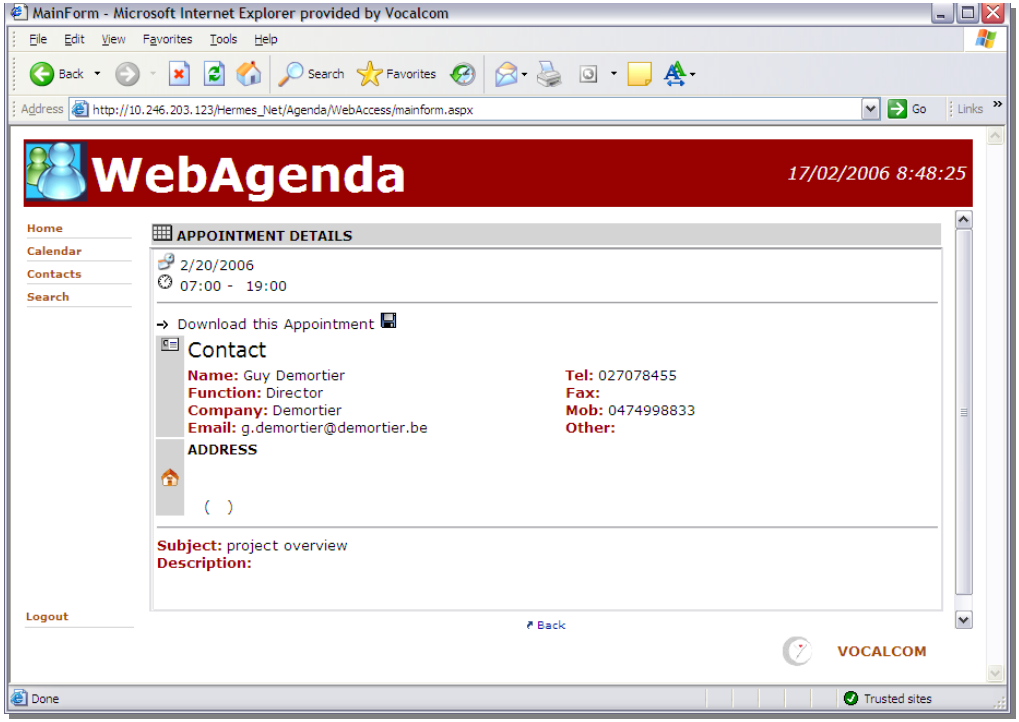


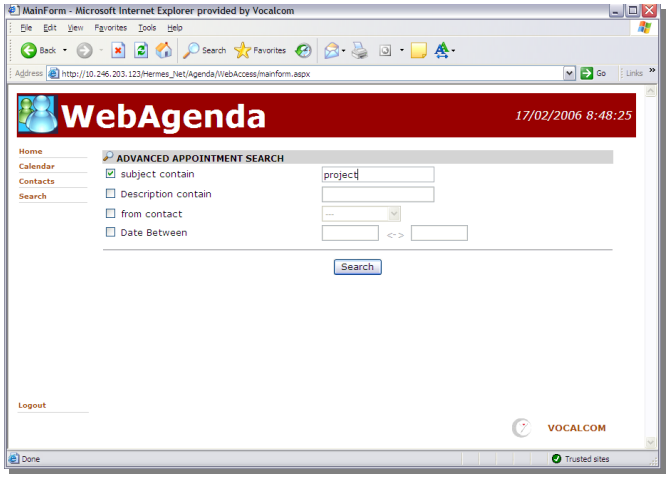
The consultation of the contacts list propose to view contacts details using the icon.




The **Contact details** window opens.

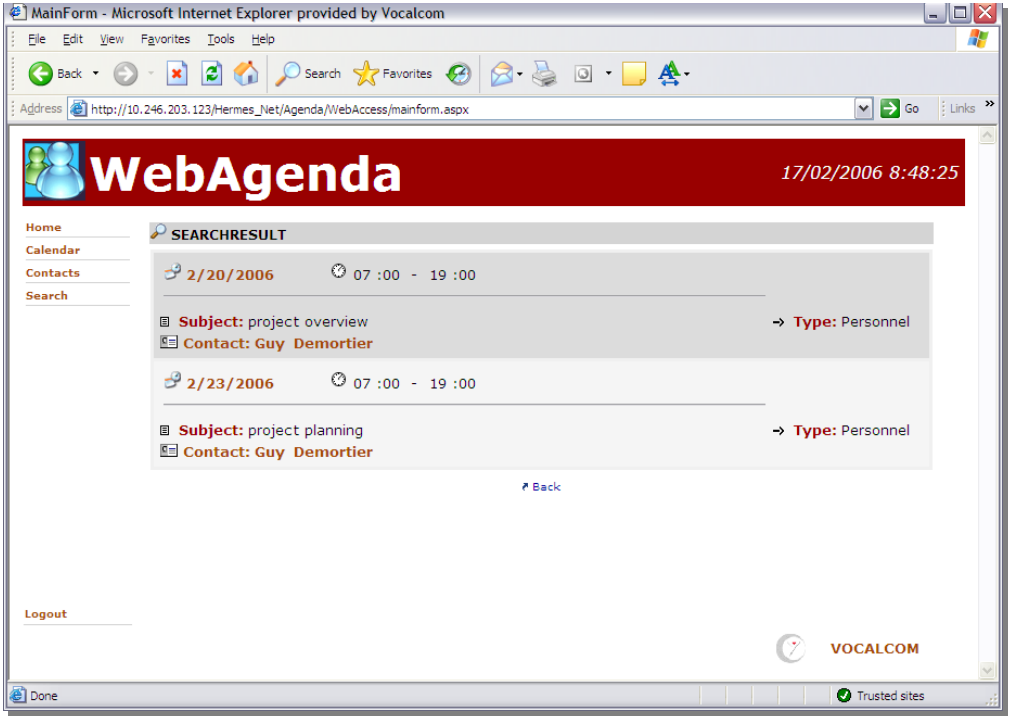



MainForm - Microsoft Internet Explorer provided by Vocalcom
File Edit View Favorites Tools Help
Back Search Favorites
Address http://10.246.203.123/Hermes_Net/Agenda/WebAccess/mainform.aspx
Go Links
WebAgenda
17/02/2006 8:48:25
Home
Calendar
Contacts
Search
APPOINTMENT DETAILS
2/20/2006
07:00 - 19:00
Download this Appointment
Contact
Name: Guy Demortier
Function: Director
Company: Demortier
Email: g.demortier@demortier.be
Tel: 027078455
Fax:
Mob: 0474998833
Other:
ADDRESS
( )
Subject: project overview
Description:
Logout
Back
VOCALCOM
Done
Trusted sites




The **Search** screen allows executing an appointment search using filters like the subject, the description, the contact or the date.

The result is the list of matching appointments as illustrated above :




If you click on the appointment date, you will open the **Appointment Details** window.

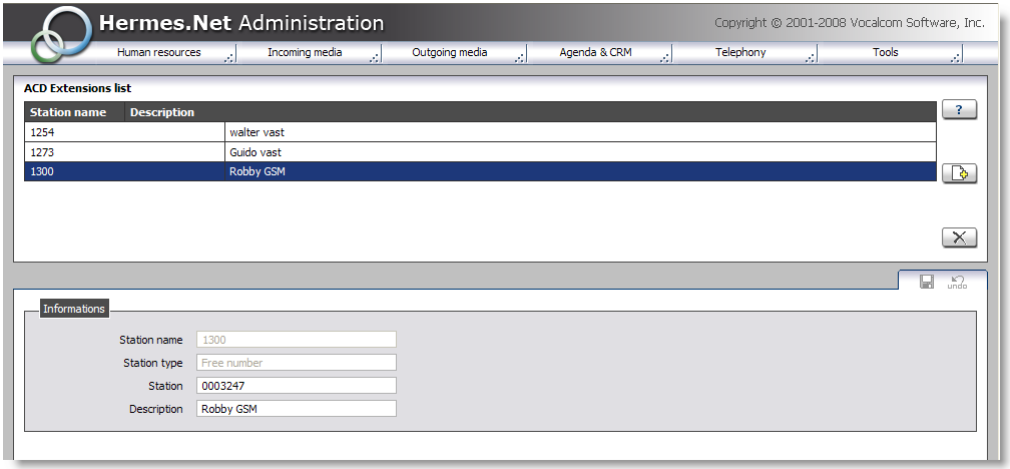
If you click on the contact name, you will open the **Contact Details** window.

# TELEPHONY

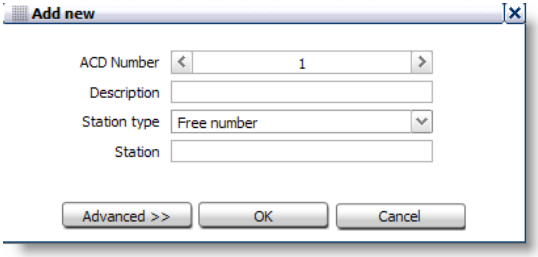
This chapter describes how to configure ACD extensions and Workstations.

## ACD extensions

ACD extensions are the abbreviated station phone numbers used on the vocalcom system. These extensions are generally used when agents are connected to a PBX. Every phone station must be declared in the system in order to be used.



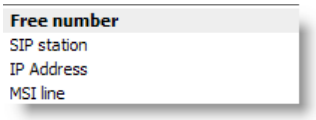

ACD extensions can be added or deleted using the and buttons.



**ACD number:** identifies the extension ID.

**Description**: to provide an identifier for easier recognition.

**Station type:** allows choosing the type of station according to the telephony infrastructure:

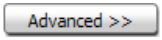



**Free number**: allows creating a station using a fix or mobile phone number

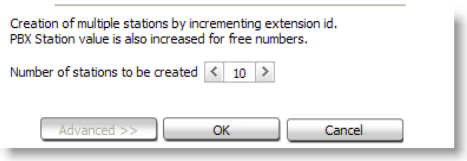
**SIP station**: is used in case a soft phone application

**IP Address**: no phone, only a pc IP address (compared to “SKYPE”)

**MSI line**: no phone, only a “black box” which is connected straight to a slot of the MSI patch panel.

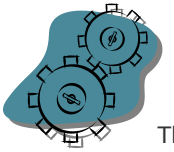
The **advanced** button 

allows creating a range of ACD extensions.


Creation of multiple stations by incrementing extension id.
PBX Station value is also increased for free numbers.
Number of stations to be created
10
Advanced >>
OK
Cancel

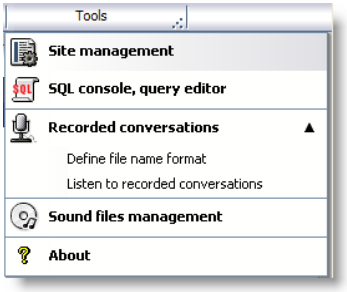
**Station**: gives the complete telephone number, IP address or MSI line to be dialed by the ACD to connect an agent.

## TOOLS



This menu gives access to the following options:

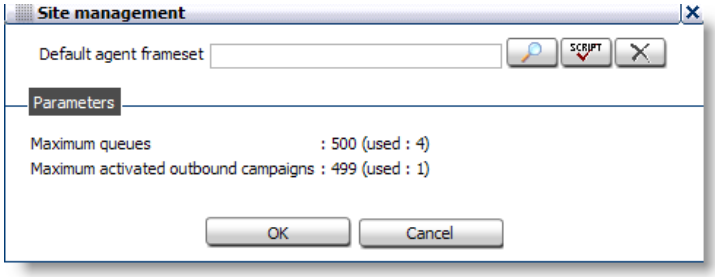
- Site management
- SQL console, query editor
- Recorded conversations
- Sound files management
- About




## Site management

This menu allows the administrator to see the resources (inbound and outbound) that have been granted to the site or company to which the administrator belongs. The administrator can also choose a frameset and apply it to his own site only. The frameset is created in the Scripter editor menu.

**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici. - Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**

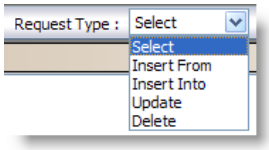



## SQL CONSOLE / QUERY EDITOR

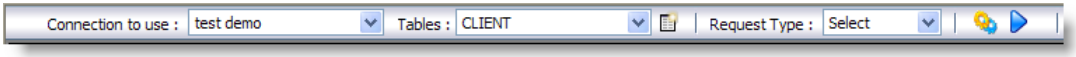
This menu is used to create and run queries (Select, Update, Delete, Insert) on any table of the database server. Working on databases can be very sensitive; therefore this window is only to be used by people who were trained accordingly.
The user doesn't need to access the database remotely because the query editor is integrated in the administration module.

### Step 1 Select connection and table to be used for query

- First a request type must be chosen according to the action intended:




- Select a "**connection**" (database) where you want the query to be run.
- Then select the "**table**" and press on the button to add the table to the query builder pane.

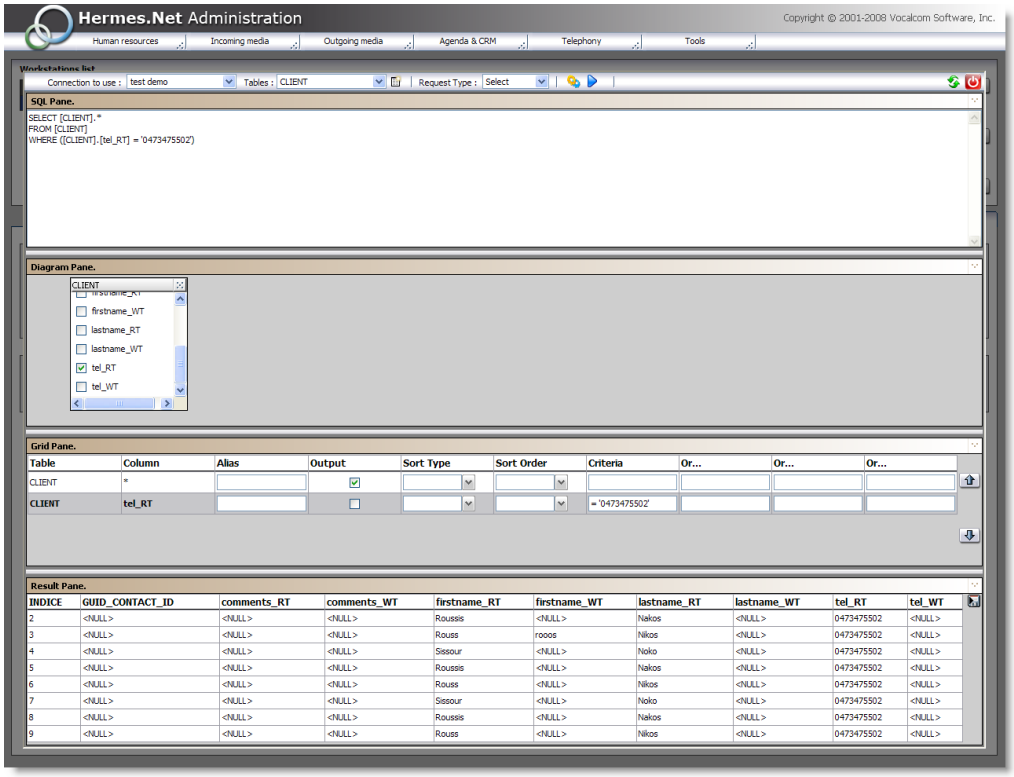



Step 2 building a query based on the chosen “Request type”

The window is divided in 4 areas:

- **SQL pane**: shows the SQL query in SQL syntax. You can also type directly your request in this pane without using the other tools.
- **Diagram pane**: allows choosing the columns used to filter the request.
- **Grid pane**: allows creating the criteria.
- **Result pane**: displays the result of the query once it’s been run using the button (top of the screen)

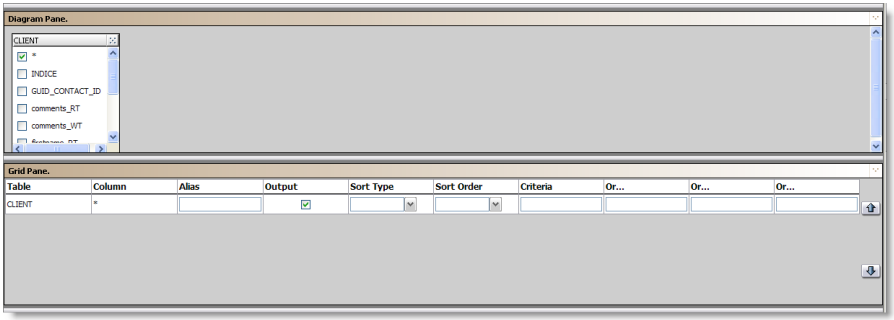
**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici. - Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**



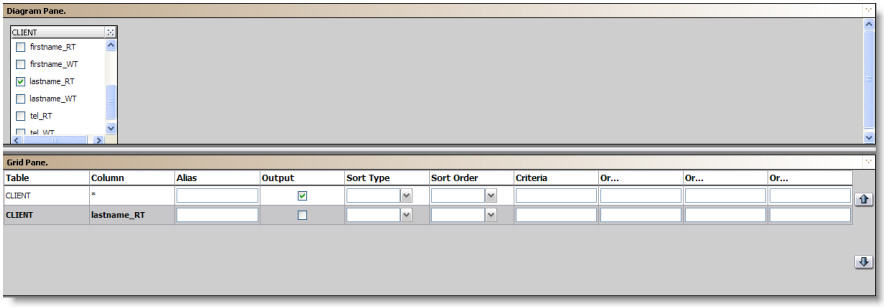

## "SELECT QUERY" EXAMPLE:

In this example, we'll try a SELECT query to find a certain customer in the database, based on his LASTNAME. This customer's last name is 'NIKOS'.

The diagram pane is used to select the columns to add to the SELECT query. Check all the boxes next to the database columns you wish to add to the result. If you use " * ", all the columns of the database will be displayed in the **result pane.**

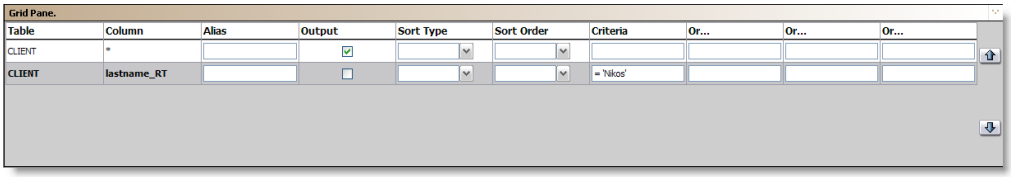



To create the "WHERE" condition you also need to select the column on which the criteria will be applied. The "OUTPUT" box must be unselected to become the "WHERE".

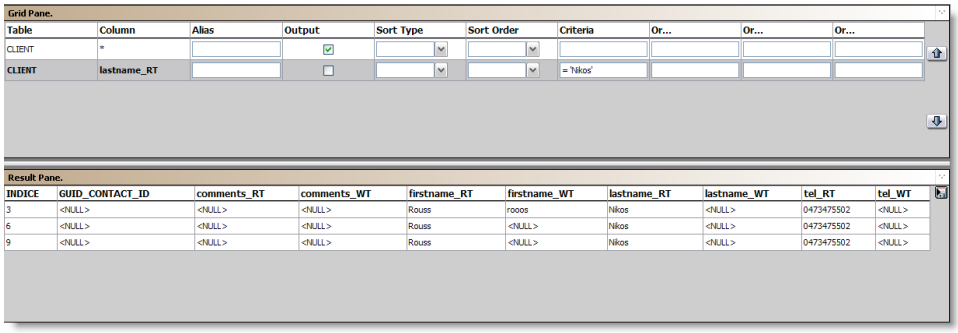



To find the customer in the database, you need to type in the last name in the "**criteria**" field as shown in the print screen below:

**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici. - Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**



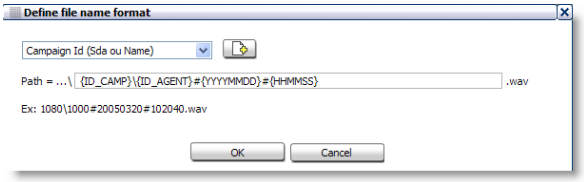

Now the query is ready to be run using the button. The "**Result**" pane will display the result of your query. You can also export by pressing the button on the right hand side.




## RECORDED CONVERSATIONS

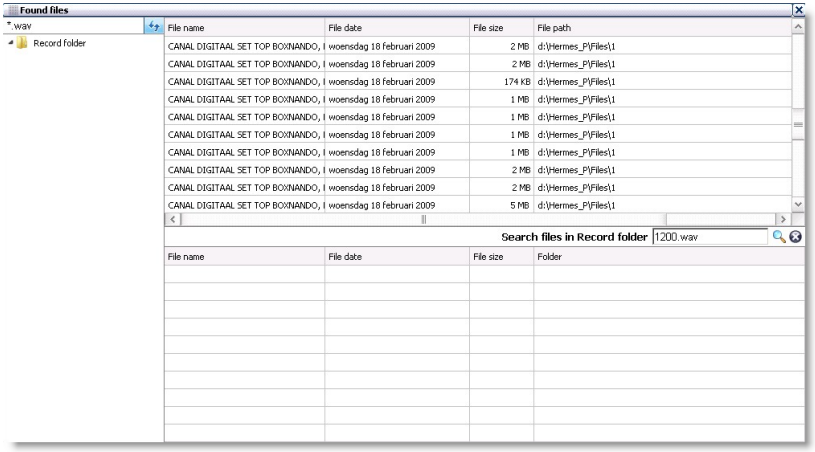
**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici.** - **Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**

**Define file name format:** this options is used to define the name format of all recorded conversation. Please refer to page 23 for more information.



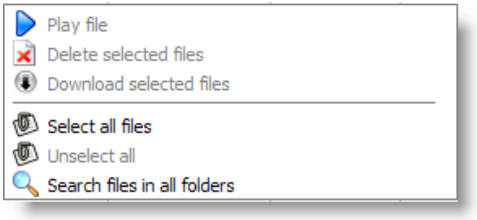

**Listen to recorded conversations:** this menu allows managing the recorded conversations. There are 3 types of call recordings:

- Campaign recording: auto recording option activated on campaign level
- Agent recording: using the agent's workstation recording option
- Supervisor recording: initiated from the supervision module


Found files
*.wav
Record folder
File name
File date
File size
File path
CANAL DIGITAAL SET TOP BOXNANDO, I woensdag 18 februari 2009 2 MB d:\Hermes_P\Files\1
CANAL DIGITAAL SET TOP BOXNANDO, I woensdag 18 februari 2009 2 MB d:\Hermes_P\Files\1
CANAL DIGITAAL SET TOP BOXNANDO, I woensdag 18 februari 2009 174 KB d:\Hermes_P\Files\1
CANAL DIGITAAL SET TOP BOXNANDO, I woensdag 18 februari 2009 1 MB d:\Hermes_P\Files\1
CANAL DIGITAAL SET TOP BOXNANDO, I woensdag 18 februari 2009 1 MB d:\Hermes_P\Files\1
CANAL DIGITAAL SET TOP BOXNANDO, I woensdag 18 februari 2009 1 MB d:\Hermes_P\Files\1
CANAL DIGITAAL SET TOP BOXNANDO, I woensdag 18 februari 2009 1 MB d:\Hermes_P\Files\1
CANAL DIGITAAL SET TOP BOXNANDO, I woensdag 18 februari 2009 2 MB d:\Hermes_P\Files\1
CANAL DIGITAAL SET TOP BOXNANDO, I woensdag 18 februari 2009 2 MB d:\Hermes_P\Files\1
CANAL DIGITAAL SET TOP BOXNANDO, I woensdag 18 februari 2009 5 MB d:\Hermes_P\Files\1
Search files in Record folder
1200.wav
File name
File date
File size
Folder

Right clicking on anywhere on the result pane will make the following window appear:

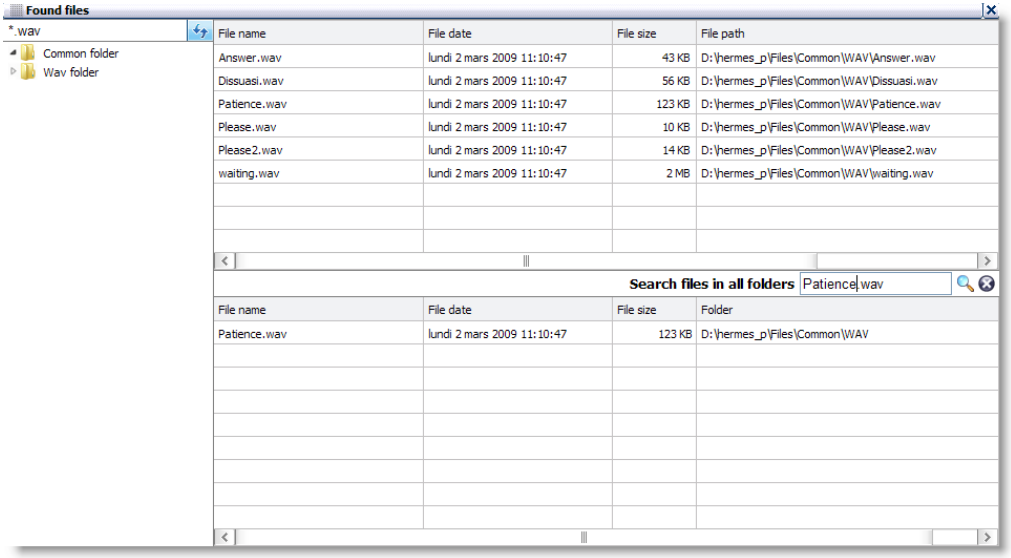
**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici. - Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**




Click on "**Play file**" to listen to the recorded conversation.

## Sound files management

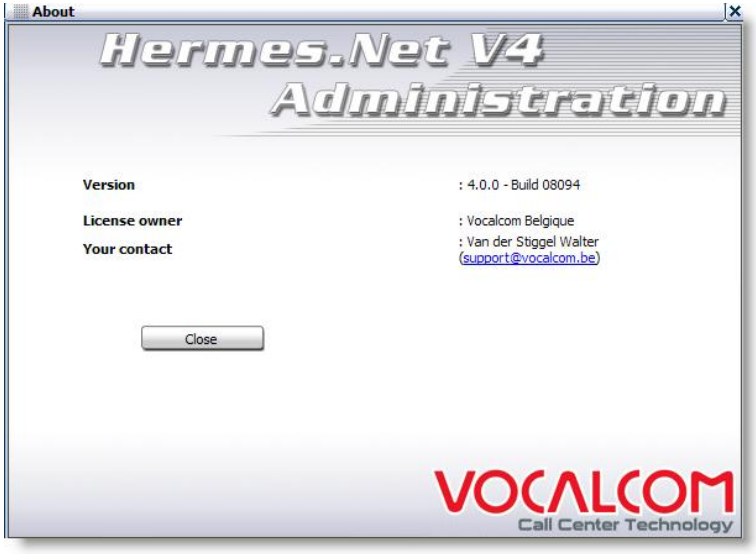
This option is used to manage (find/upload/delete) the sound files saved on the server.



**Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 1;Titre 1 au texte que vous souhaitez faire apparaître ici. - Erreur ! Utilisez l'onglet Accueil pour appliquer Heading 2;Titre 2 au texte que vous souhaitez faire apparaître ici.**

## ABOUT

This window gives access to the server license information.



ANNEX

This chapter provides additional information on the administration application and general telephony topics.

## Waiting loop structure

When a call is queued, a sequence of wav file messages is used. This section describes the order of the messages in this sequence. If a particular message is not defined in the system, it is ignored and the sequence goes to the next message.

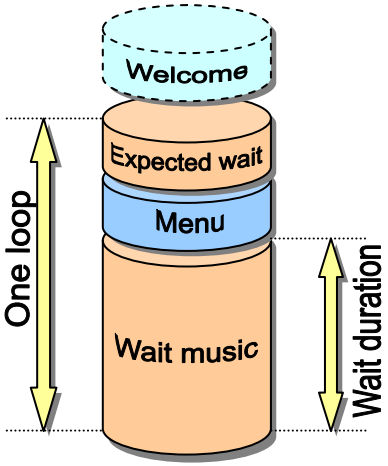
The first message played is the **Welcome** message. It is played just before entering the queue. It is not considered as part of the loop as it is played only once.

The following messages are considered as part of the loop:

The first message in a loop is always the **Expected wait** message. It is followed by the **Interactive Menu** message or IVR scenario. In last position, the **Wait** message is played.

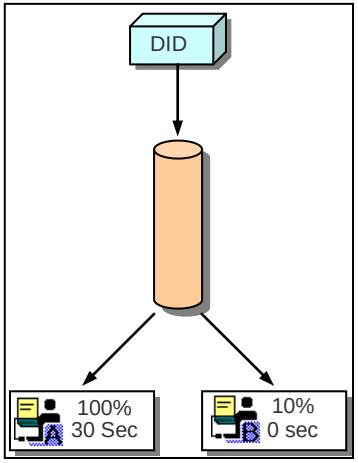
The **Wait duration** parameter specifies how long the **Wait** message must be played. When this time is elapsed, the system goes to the next loop.

The system loops a number of times corresponding to the **Wait loops** parameter. When the number of loops has been reached, the system goes to overflow mode.




## Call Distribution

Entry points for incoming calls are entities called campaigns. Campaigns (or IVR scenarios linked to them) select the queue in which the call will be put. The queue choice is trivial when not using an IVR scenario: the queue field is taken from the campaign definition. When using an IVR, this default value can be changed and any queue can be chosen dynamically according to IVR-dependant conditions.




Agents can take calls from queues if they have been assigned with skills on that queue. When several agents are available, the agent with most appropriate level is chosen.

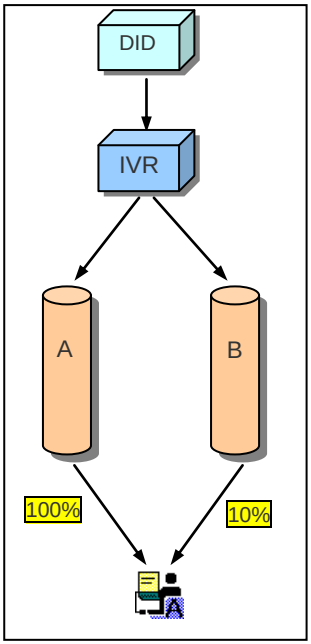
The delay parameter is also taken into account when selecting the agent. For example, the picture on the left shows a call being queued. Two agents are logged on that queue. Agent A has 100% level and a 30 seconds delay. Agent B has 10% level and no delay. If both agents are ready, B will take the call, as he has no delay. If the delay is removed, agent A would take the call as he has a better level than B.

If both agents are ready when a call enters the queue, B will take the call as there is 0 sec delay. In the same situation without any delay, A would take the call.

Another important matter is call distribution from different queues. When calls are waiting in multiple queues and an agent having skills on those queues is ready, the call that will be taken is the call with the longest wait time (regardless of the agent's skills).

For example, on the picture to the right, a call is waiting for one hour in queue B and another call is waiting for 30 seconds in queue A. When the agent becomes ready, he receives the call from B even if his skill level on that queue (10%) is the lowest of his skills levels.

The last parameter of call distribution is called profiling. Profiling must be considered as string matching between the call profile and the agent profile.




In order to handle a call, an agent's profile must be "higher" than the minimum required call profile ("higher" must be interpreted as string comparison). By default, the profile checking takes precedence over the delay parameter and skill level.

This procedure can be changed by modifying the profile of the call while it is waiting in the queue. This can be done with an IVR scenario through the $AcdComQualif variable (See "IVR Editor user documentation" for more information).